

Request for Proposal (RFP) Events

The Cardinal Purchasing Module provides the Strategic Sourcing (SS) Buyer with a means to create, manage and award Strategic Sourcing Events. The most common event is the Invitation for Bid (IFB) which is primarily awarded to the lowest responsive and responsible bidder meeting the required specifications. Cardinal also provides similar functionality to create, manage and award the 2-Step IFB Event and Request for Proposal (RFP) Event. In comparison to the lowest price, these event types are awarded based on the ranking of the offerors' responses and subsequent negotiations with such offerors, to achieve the best value.

RFPs are commonly known as Competitive Negotiations. These events are created with criteria that are weighted (ranked) by level of importance and scored by each Collaborator based on the offerors' submitted proposals. The lowest price is only one of multiple elements used in determining the highest ranking offeror to make an award.

This job aid discusses a typical Competitive Negotiation Event process, from start to award. Actual events will vary in content and complexity.

Refer to the **PROC345: Strategic Sourcing** course for more information on Strategic Sourcing events and how to process them in Cardinal.

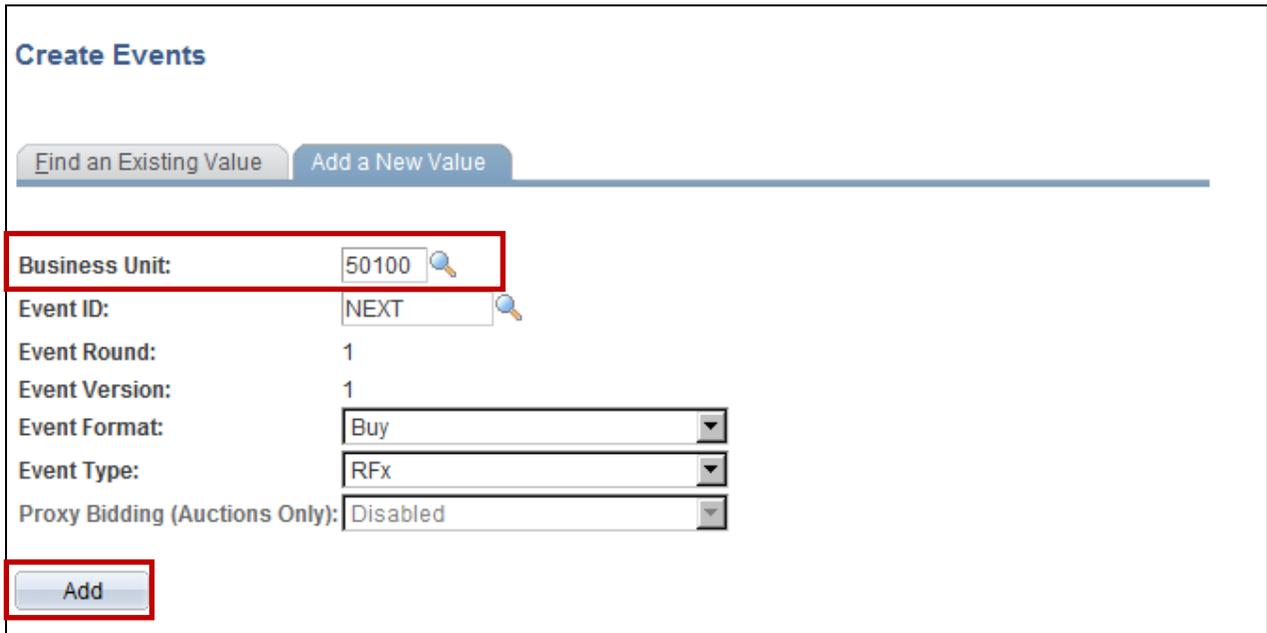
TABLE OF CONTENTS

Scenario	Page
Adding a RFP Event.....	2
Enter Offeror Responses.....	27
Analyzing Proposals and Awarding RFP Events.....	34

Adding a RFP Event

- 1 Navigate using the following path:

Main Menu > Sourcing > Create Events > Event Details



Create Events

Find an Existing Value Add a New Value

Business Unit: 50100

Event ID: NEXT

Event Round: 1

Event Version: 1

Event Format: Buy

Event Type: RFx

Proxy Bidding (Auctions Only): Disabled

Add

- 2 On the **Add a New Value** tab, confirm the **Business Unit** for your agency (i.e., VDOT is 50100). All other field values default.
- 3 Click the **Add** button.

Favorites | Main Menu > Sourcing > Create Events > Event Details

Create an Event

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy

Event Type:	RFX	Change to Auction
Event Status:	Open	
*Solicitation Type:	Request for Proposal	
*Event Name:	<input type="text"/>	
Description:	<input type="text"/>	
Preview Date:	09/19/2011 4:06PM EDT	
*Start Date:	10/03/2011 4:06PM EDT	
*End Date:	10/13/2011 4:06PM EDT	
Copy From:	<input type="text"/>	<input type="button" value="Go"/>

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

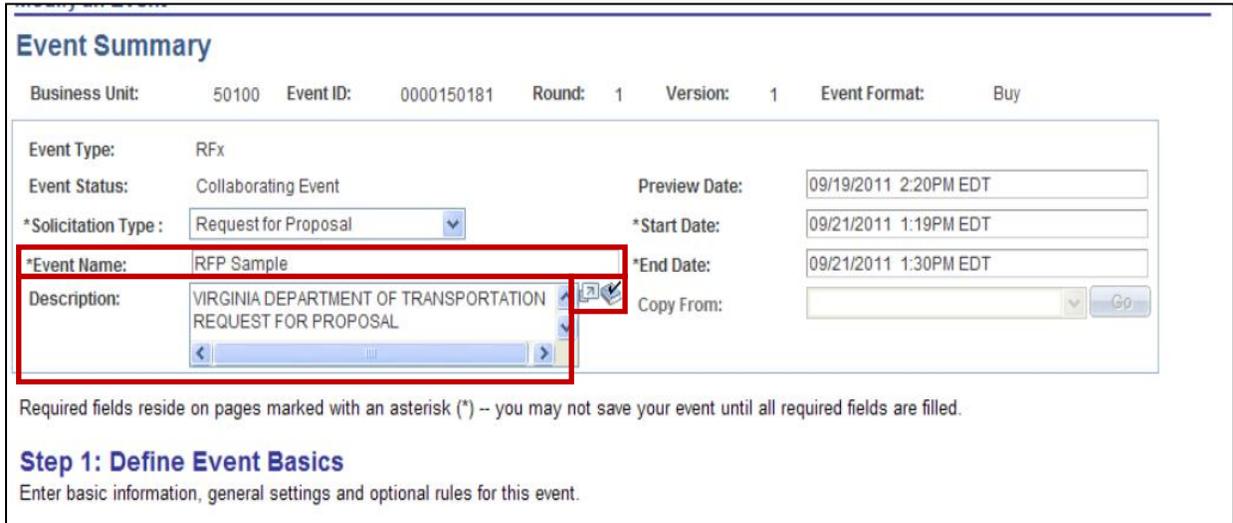
Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

4 The **Event Summary** page displays. Select **Request for Proposal** from the **Solicitation Type** drop down menu.

5 Enter dates as applicable.

Note: Preview Date is the agency due date to complete any and all document edits, collaboration and approvals prior to posting (advertisement). **Start Date** is the event advertisement date. **End Date** is the event closing date.



Event Summary

Business Unit: 50100 Event ID: 0000150181 Round: 1 Version: 1 Event Format: Buy

Event Type: RFX
Event Status: Collaborating Event Preview Date: 09/19/2011 2:20PM EDT

*Solicitation Type: Request for Proposal *Start Date: 09/21/2011 1:19PM EDT

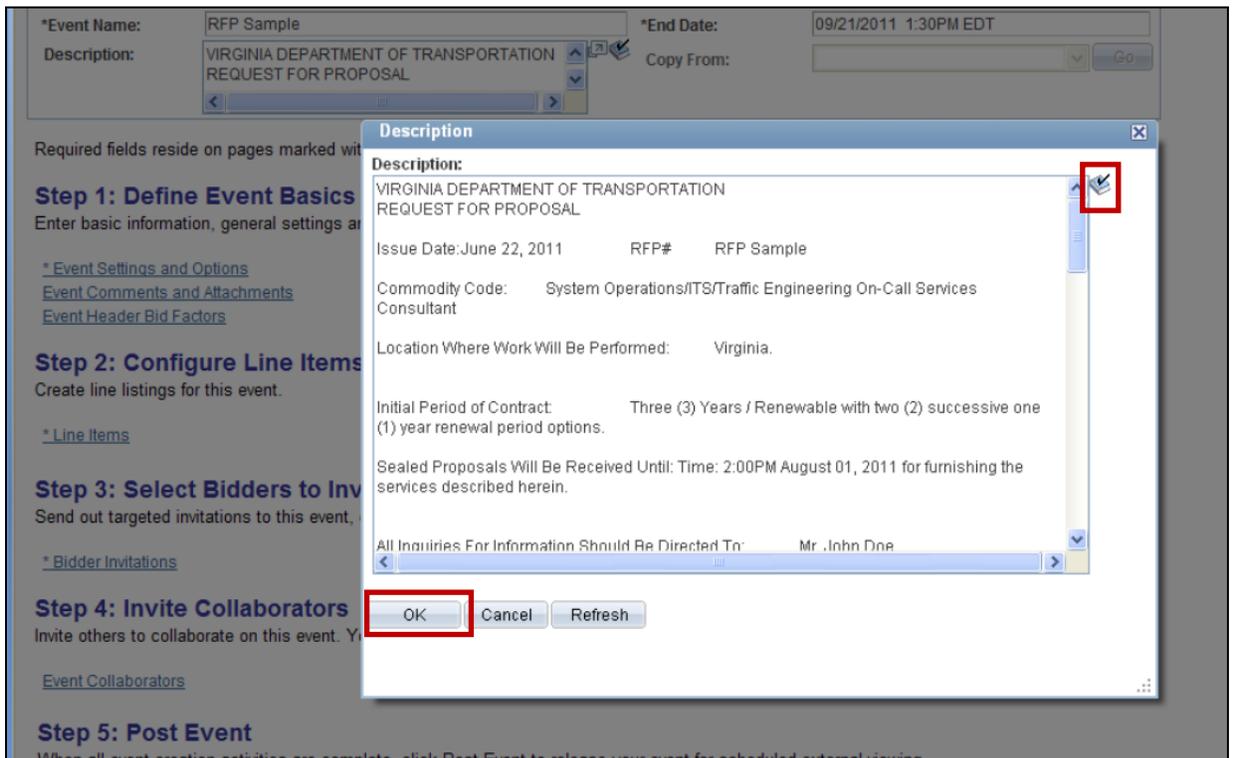
*Event Name: RFP Sample *End Date: 09/21/2011 1:30PM EDT

Description: VIRGINIA DEPARTMENT OF TRANSPORTATION REQUEST FOR PROPOSAL Copy From: Go

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

- 6 Enter the **Event Name** and **Description**.
- 7 Click the **Arrow** icon to expand the **Description** field, if necessary.



*Event Name: RFP Sample *End Date: 09/21/2011 1:30PM EDT

Description: VIRGINIA DEPARTMENT OF TRANSPORTATION REQUEST FOR PROPOSAL Copy From: Go

Required fields reside on pages marked with

Step 1: Define Event Basics
Enter basic information, general settings and

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event.

[* Bidder Invitations](#)

Step 4: Invite Collaborators
Invite others to collaborate on this event. You

[Event Collaborators](#)

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing.

Description

Description: VIRGINIA DEPARTMENT OF TRANSPORTATION REQUEST FOR PROPOSAL

Issue Date: June 22, 2011 RFP# RFP Sample

Commodity Code: System Operations/ITS/Traffic Engineering On-Call Services Consultant

Location Where Work Will Be Performed: Virginia.

Initial Period of Contract: Three (3) Years / Renewable with two (2) successive one (1) year renewal period options.

Sealed Proposals Will Be Received Until: Time: 2:00PM August 01, 2011 for furnishing the services described herein.

All Inquiries For Information Should Be Directed To: Mr. John Doe

OK Cancel Refresh

- 8 Enter text in the **Description** field (up to 2000 words or 10,000 characters).
Note: You may type text into the field or cut and paste from another document. Spell-check is available by clicking the **Checkbook** icon.
- 9 Click the **OK** button.

Required fields are on pages marked with an asterisk (*) - you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constraints](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#) [Item Line Defaults](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Related Links:

[Document Status Inquiry](#) [Plan Task Associations](#)

10 Click the **Save Event** button to save the header.

Favorites Main Menu > Sourcing > Create Events > Event Details

Business Unit: 50100 **Event ID: 0000150181** Round: 1 **Version: 1** Event Format: Buy

Event Type: RFX
 Event Status: Collaborating Event
 *Solicitation Type: Request for Proposal
 *Event Name: RFP Sample
 Description: VIRGINIA DEPARTMENT OF TRANSPORTATION REQUEST FOR PROPOSAL

Preview Date: 09/19/2011 2:20PM EDT
 *Start Date: 09/21/2011 1:19PM EDT
 *End Date: 09/21/2011 1:30PM EDT
 Copy From: [] Go

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
 Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constraints](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items
 Create line listings for this event.

11 An **Event ID** and **Version** number are assigned.

Note: This does not post the event. Also note that Round is not used, so the value shown next to Round should be ignored.

12 Click the **Event Settings and Options** hyperlink.

Create an Event

Event Settings and Options

Business Unit: 50100 Event ID: 0000150085 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Allow Bidder XML Downloads Round/Version Display: Do Not Display
 Bid Required On All Lines Sealed Event
 Multiple Bids Allowed Display Bid Factor Weightings
 Allow Edit of Posted Bids

Factor Event Score Into: Line Score and Total Score Start Price: Do Not Display
 Header Weighting: 80.00000
 Line Factor Weighting: 20.00000

Bidders May Create Line Groups
 Allow Price Breaks with Groups

▶ Associated Categories

GoTo: [] Go

[< Return to Event Overview](#)

13 Check the boxes that apply. For Example: **Sealed Event** and **Display Bid Factor Weightings**.

14 Select the **Line Score and Total Score** type for scoring.

15 Enter **Header** and **Line** factor weights as determined.

16 Click **Save Event Changes**.

17 Click on **Return to Event Overview** hyperlink.

Event Summary

Business Unit: 50100 Event ID: 0000150181 Round: 1 Version: 1 Event Format: Buy

Event Type: RFX
 Event Status: Collaborating Event
 *Solicitation Type: Request for Proposal
 *Event Name: RFP Sample
 Description: VIRGINIA DEPARTMENT OF TRANSPORTATION REQUEST FOR PROPOSAL

Preview Date: 09/19/2011 2:20PM EDT
 *Start Date: 09/21/2011 1:19PM EDT
 *End Date: 09/21/2011 1:30PM EDT
 Copy From:

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constrains](#)
[Event Header Bid Factors](#)

18 Click the **Event Comments and Attachments** hyperlink.

Event Header Comments and Attachments

Event ID: 0000150181

Enter Comments View All First 1 of 31 Last

Comments:

System Operations/ITS/Traffic Engineering On-Call Services Consultant RFP

1.0 PURPOSE
 The purpose of this Request for Proposals (RFP) is to solicit sealed proposals (hereinafter Proposal or Proposals) to establish the possibility of multiple contracts through competitive negotiation to provide technical expertise in system operations, ITS, traffic engineering and safety and to provide related staff augmentation services to the Virginia Department of Transportation (hereinafter referred to as VDOT, the Department or the agency). The selected Offeror (one consultant team per awarding entity) shall provide high-level business, management and financial staff augmentation services to Operations & Security Division (OSD), Traffic Engineering Division (TED), and VDOT Northern Virginia District (NOVA), as

Send To Bidder Include On Award [Standard Comments](#)

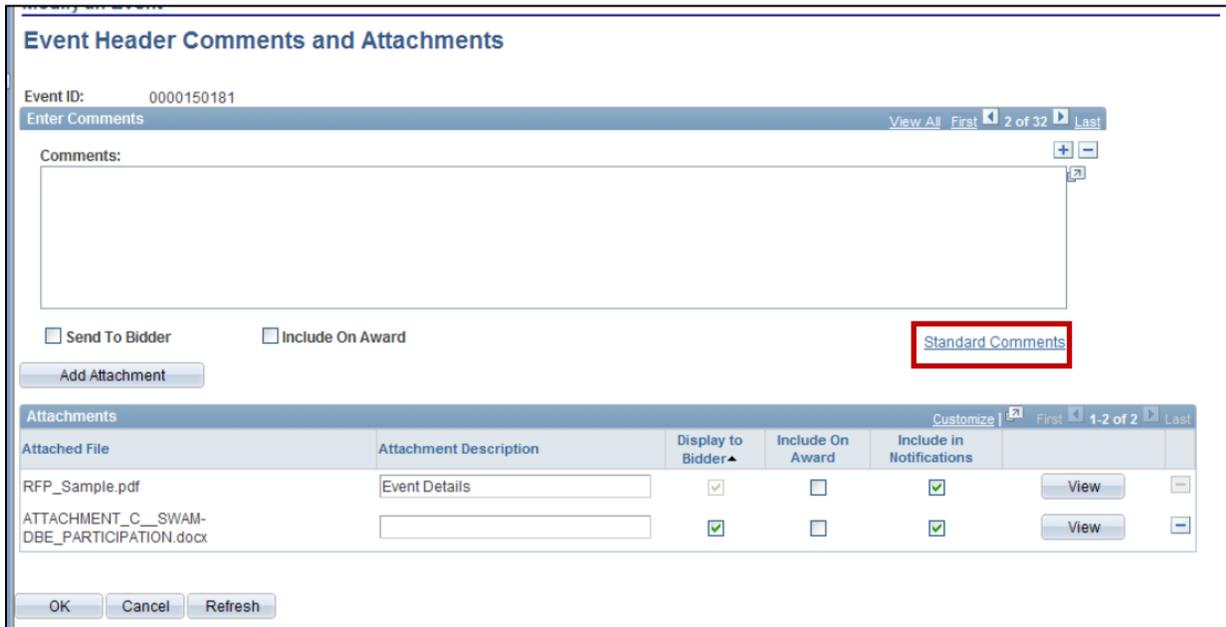
Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
RFP_Sample.pdf	Event Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="View"/> <input type="button" value="-"/>
ATTACHMENT_C_SWAM-DBE_PARTICIPATION.docx		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="View"/> <input type="button" value="-"/>

19 The **Event Header Comment and Attachments** page displays.

20 Enter comments in the **Comments** field and add attachments as applicable.

Note: You can type text into the field or cut and paste text from another document. Also note that the **Comments** field may contain a maximum of 3000 characters.

21 Click the blue **+** (**plus**) sign to add additional comments.



Event Header Comments and Attachments

Event ID: 0000150181

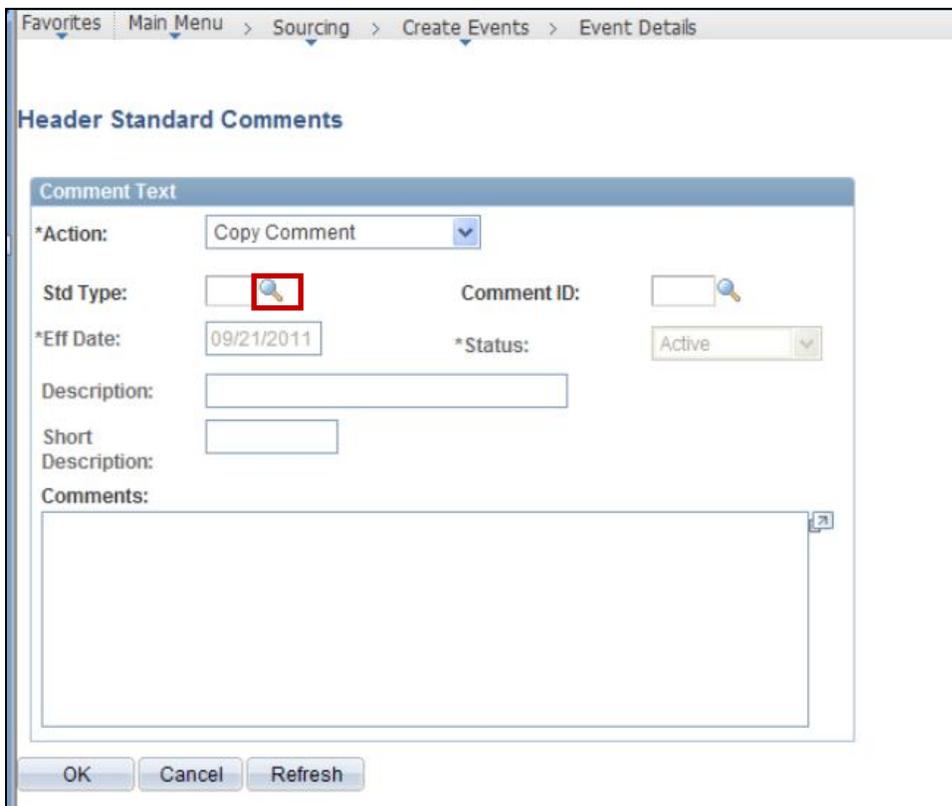
Enter Comments View All First 2 of 32 Last

Comments:

Send To Bidder Include On Award [Standard Comments](#)

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
RFP_Sample.pdf	Event Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="View"/> <input type="button" value="-"/>
ATTACHMENT_C_SWAM-DBE_PARTICIPATION.docx		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="View"/> <input type="button" value="-"/>

- 22** Click the **Standard Comments** hyperlink to add Special Terms and Conditions pre-loaded in the system.



Header Standard Comments

Comment Text

*Action: Copy Comment

Std Type: Comment ID:

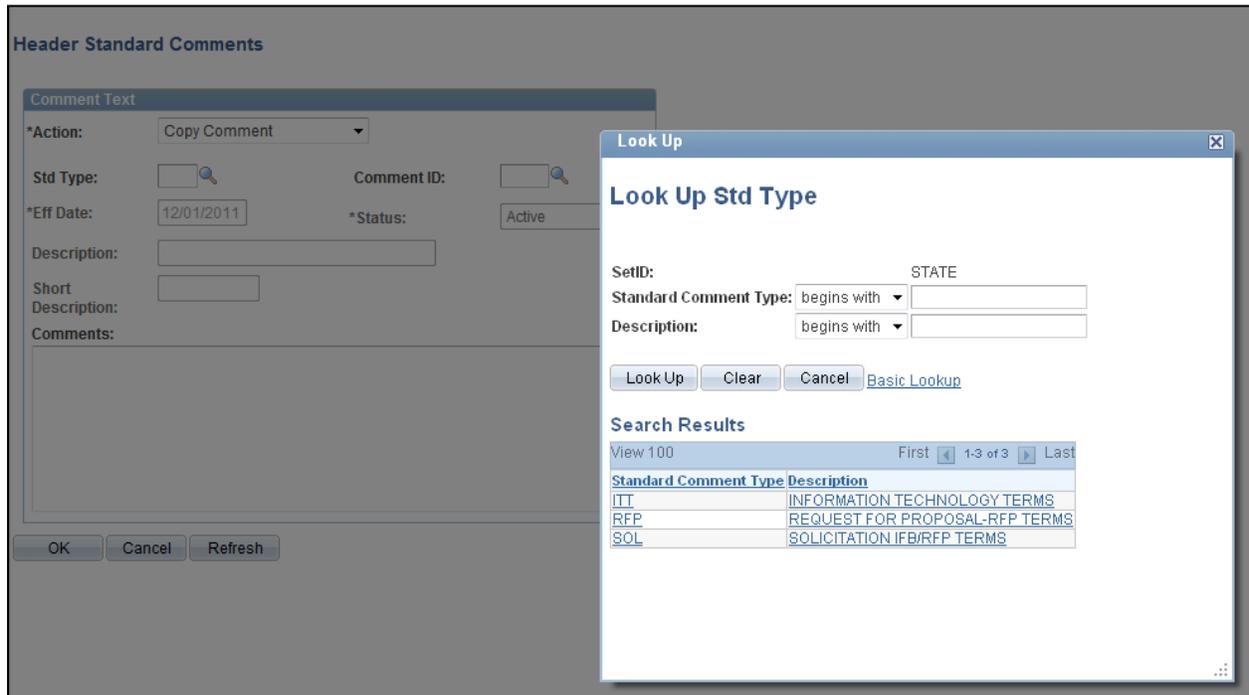
*Eff Date: 09/21/2011 *Status: Active

Description:

Short Description:

Comments:

- 23** Click the **Std Type** lookup button.



Header Standard Comments

Comment Text

*Action: Copy Comment

Std Type: Comment ID:

*Eff Date: 12/01/2011 *Status: Active

Description:

Short Description:

Comments:

OK Cancel Refresh

Look Up

Look Up Std Type

SetID: STATE

Standard Comment Type: begins with

Description: begins with

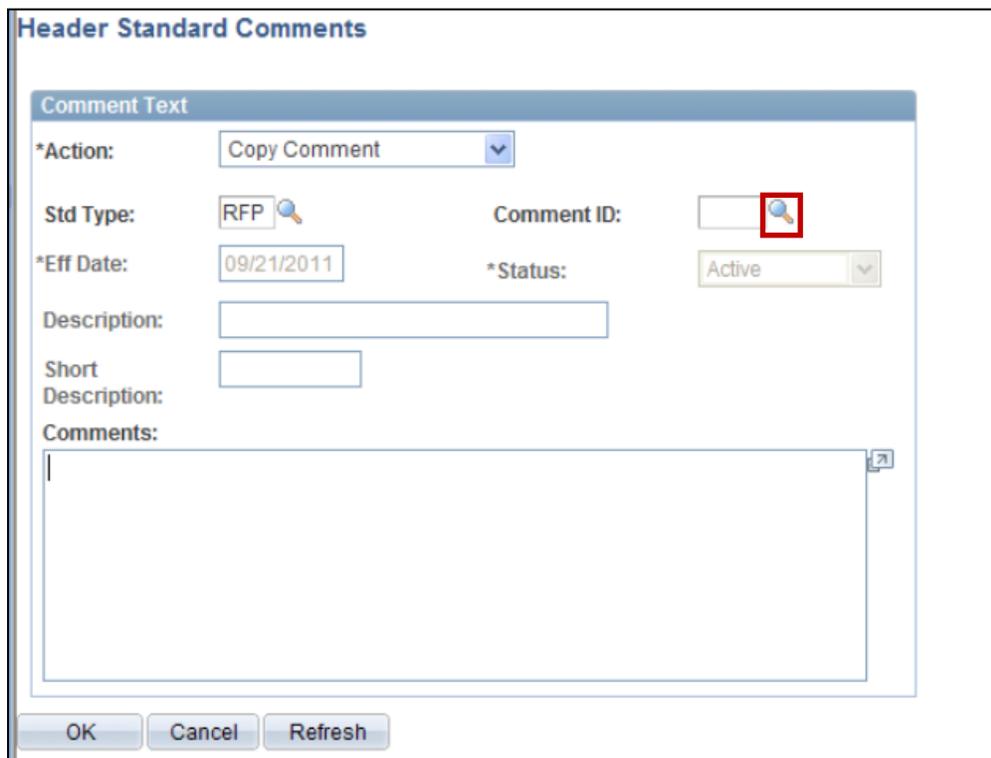
Look Up Clear Cancel [Basic Lookup](#)

Search Results

View 100 First 1-3 of 3 Last

Standard Comment Type	Description
ITT	INFORMATION TECHNOLOGY TERMS
RFP	REQUEST FOR PROPOSAL-RFP TERMS
SOL	SOLICITATION IFB/RFP TERMS

24 Comment types are listed and available for selection. Select **RFP** from the lookup results.



Header Standard Comments

Comment Text

*Action: Copy Comment

Std Type: RFP Comment ID:

*Eff Date: 09/21/2011 *Status: Active

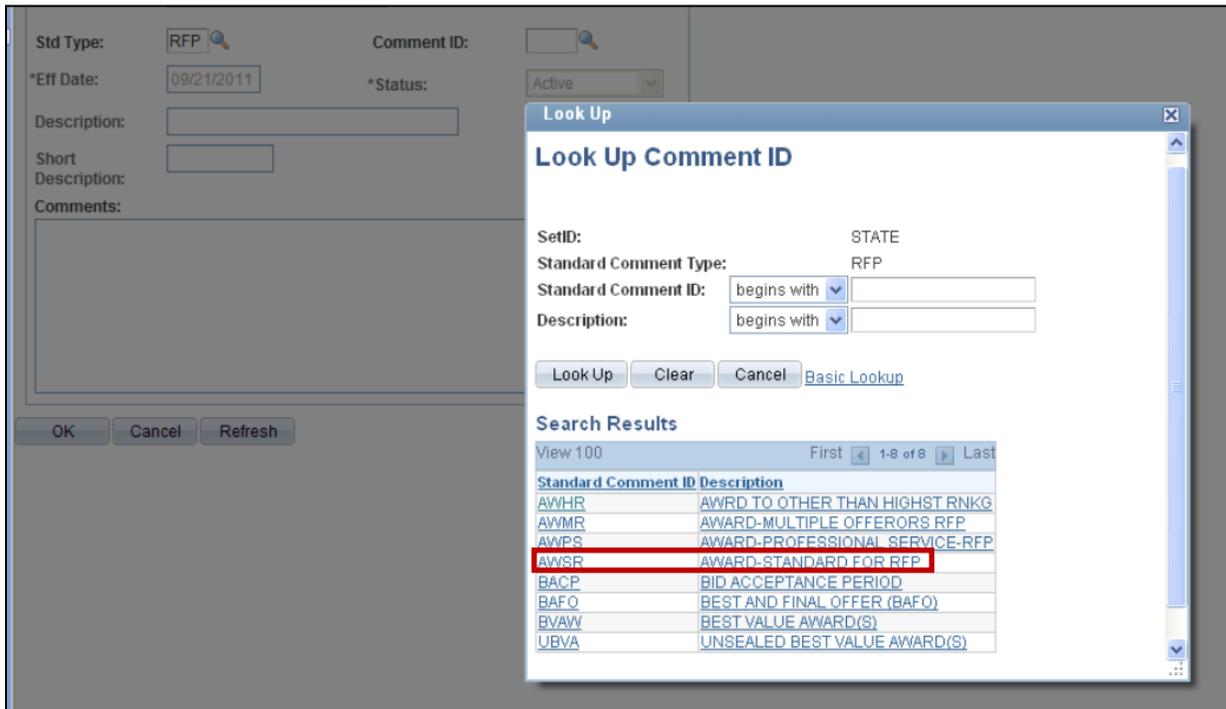
Description:

Short Description:

Comments:

OK Cancel Refresh

25 Click the **Comment ID** lookup button.



The screenshot shows a software interface with a 'Look Up' dialog box. The dialog box has the following fields and options:

- Std Type: RFP
- Comment ID: [Searchable field]
- *Eff Date: 09/21/2011
- *Status: Active
- Description: [Text field]
- Short Description: [Text field]
- Comments: [Text area]

The 'Look Up' dialog box contains the following search criteria:

- SetID: STATE
- Standard Comment Type: RFP
- Standard Comment ID: begins with [Text field]
- Description: begins with [Text field]

Buttons: Look Up, Clear, Cancel, Basic Lookup

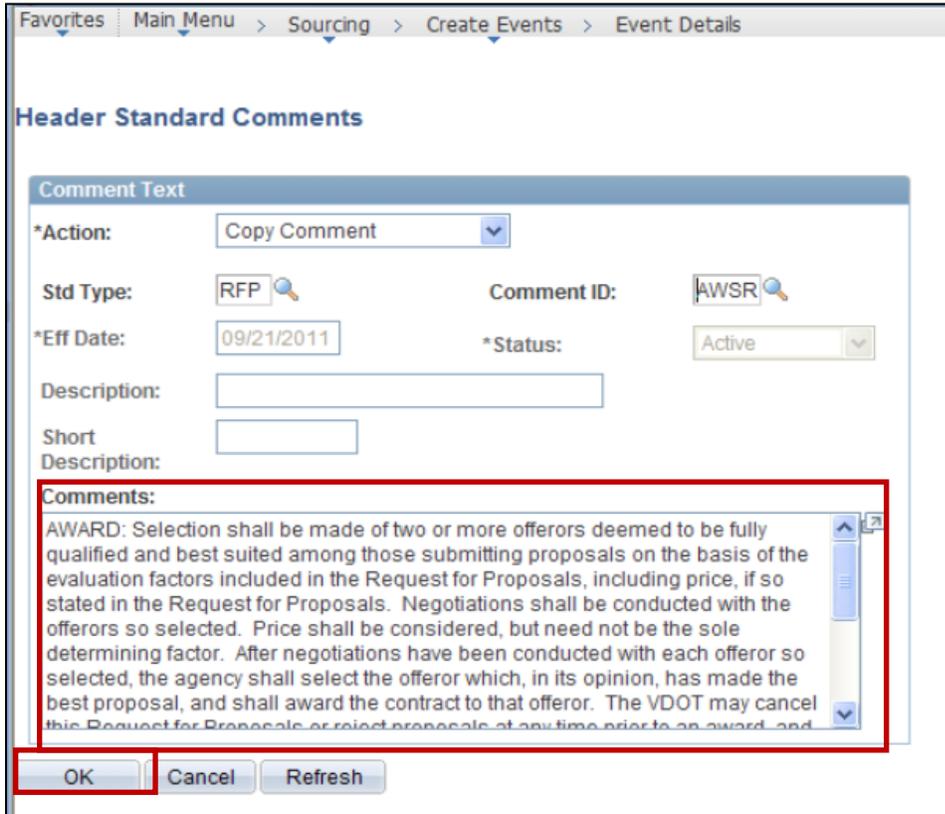
Search Results

View 100 First 1-8 of 8 Last

Standard Comment ID	Description
AWHR	AWRD TO OTHER THAN HIGHST RNKG
AWMR	AWARD-MULTIPLE OFFERORS RFP
AWPS	AWARD-PROFESSIONAL SERVICE-RFP
AWSR	AWARD-STANDARD FOR RFP
BACP	BID ACCEPTANCE PERIOD
BAFO	BEST AND FINAL OFFER (BAFO)
BVAW	BEST VALUE AWARD(S)
UBVA	UNSEALED BEST VALUE AWARD(S)

26 Standard Comments specific to RFPs are listed and available for selection. Select a **Standard Comment** specific to the event.

Note: Not all **Standard Comments** are necessary or applicable.



Favorites Main Menu > Sourcing > Create Events > Event Details

Header Standard Comments

Comment Text

*Action: Copy Comment

Std Type: RFP Comment ID: AWSR

*Eff Date: 09/21/2011 *Status: Active

Description:

Short Description:

Comments:

AWARD: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The VDOT may cancel this Request for Proposals or reject proposals at any time prior to an award, and

OK Cancel Refresh

- 27 Standard preloaded comments appear in the **Comments** field.
- 28 Click the **OK** button.
- 29 The **Standard Comment** is added to the event header in the **Comments** field.

Note: The text may be edited.

Event Header Comments and Attachments

Event ID: 0000150181

Enter Comments View All First 2 of 32 Last

Comments:

AWARD: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The VDOT may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous (Code of Virginia, § 2.2-4359D). Should the VDOT determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the other under consideration, a contract may be negotiated and awarded to that offeror. The award document will be entered in accordance with the award document template.

Send To Bidder Include On Award [Standard Comments](#)

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
RFP_Sample.pdf	Event Details	✓	<input type="checkbox"/>	✓	<input type="button" value="View"/>
ATTACHMENT_C__SWAM-DBE_PARTICIPATION.docx		✓	<input type="checkbox"/>	✓	<input type="button" value="View"/>

30 Repeat steps 23-29 to add additional **Standard Comments**.

Favorites Main Menu > Sourcing > Create Events > Event Details

Header Standard Comments

Comment Text

*Action:

Std Type: SOL

Comment ID:

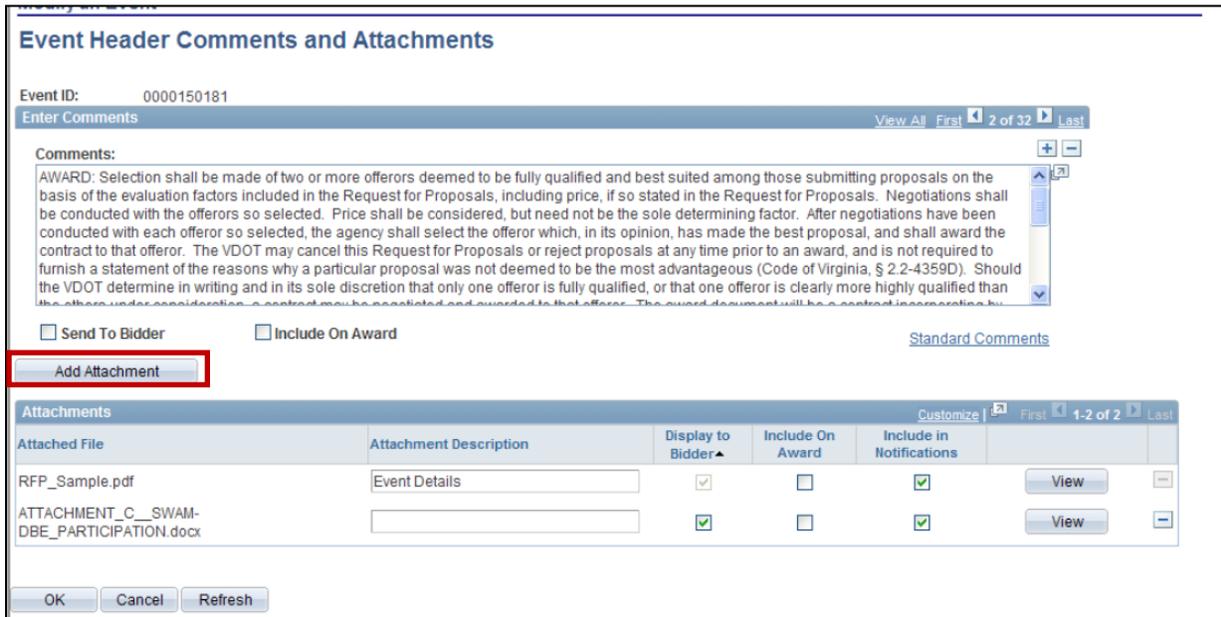
*Eff Date: 09/21/2011 *Status:

Look Up

DPNT	DELIVERY POINT
DSCT	DISCOUNTS
EBGO	eVA BUSINESS-To-GVRNMNT ORDERS
EQCT	EQUIPMENT CERTIFICATIONS
ETQS	ESTIMATED QUANTITIES
FINS	FINAL INSPECTION
FRCT	FLAME RETARDANT CERTIFICATE
IBPE	IDENTIF BID/PROPOSAL ENVELOPE
IJST	INSPECTION OF JOB SITE
IMSS	INSURANCE, MONEY AND SECURTIES
INDM	INDEMNIFICATION
INSN	INSTALLATION
LHSS	LABELING OF HAZARDS SUBSTANCES
LOLY	LIMITATION OF LIABILITY
LQDS	LIQUIDATED DAMAGES
MNMS	MAINTENANCE MANUALS
MSDS	MATERIAL SAFETY DATA SHEETS
MSPT	NAME OF MANFC AND SHIP POINT
MVST	MINORS ON WORK SITE
NEWE	NEW EQUIPMENT
NWLB	NEGOTIATION W/ LOWEST BIDDER
OROP	ORDERING OPTION
PASB	PRODUCT AVAILBLTY/SUBSTITUTION

31 Select **Std Type SOL** for all other **Standard Comments**.

Note: It is not necessary to add a new **Comment** field for each different **Standard Comment**. Using a single **Comment** field, click the **Standard Comments** hyperlink and select each **Standard Comment**, one at a time. Each **Standard Comment** fills at the bottom of the existing **Comments** text. The **Comments** field may contain a maximum of 3000 characters, so adding a new **Comment** field may be necessary if you need to add several **Standard Comments**.



Event Header Comments and Attachments

Event ID: 0000150181

Enter Comments View All First 2 of 32 Last

Comments:

AWARD: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The VDOT may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous (Code of Virginia, § 2.2-4359D). Should the VDOT determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be executed and awarded to that offeror. The award document will be a contract incorporating by reference the terms and conditions of the Request for Proposals.

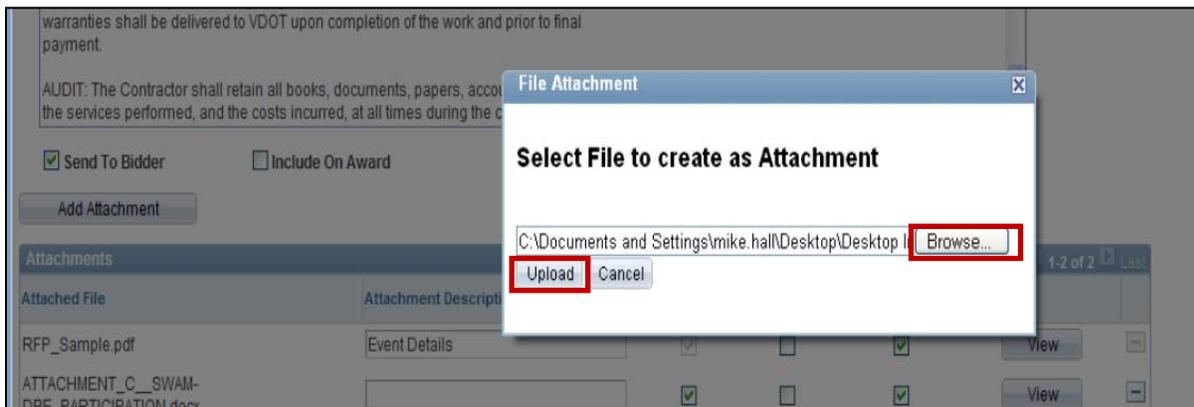
Send To Bidder Include On Award [Standard Comments](#)

Add Attachment

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
RFP_Sample.pdf	Event Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
ATTACHMENT_C__SWAM-DBE_PARTICIPATION.docx		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View

OK Cancel Refresh

32 Click the **Add Attachment** button to add attachments.



warranties shall be delivered to VDOT upon completion of the work and prior to final payment.

AUDIT: The Contractor shall retain all books, documents, papers, accounts, and records of the services performed, and the costs incurred, at all times during the contract.

Send To Bidder Include On Award

Add Attachment

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
RFP_Sample.pdf	Event Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
ATTACHMENT_C__SWAM-DBE_PARTICIPATION.docx		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View

File Attachment

Select File to create as Attachment

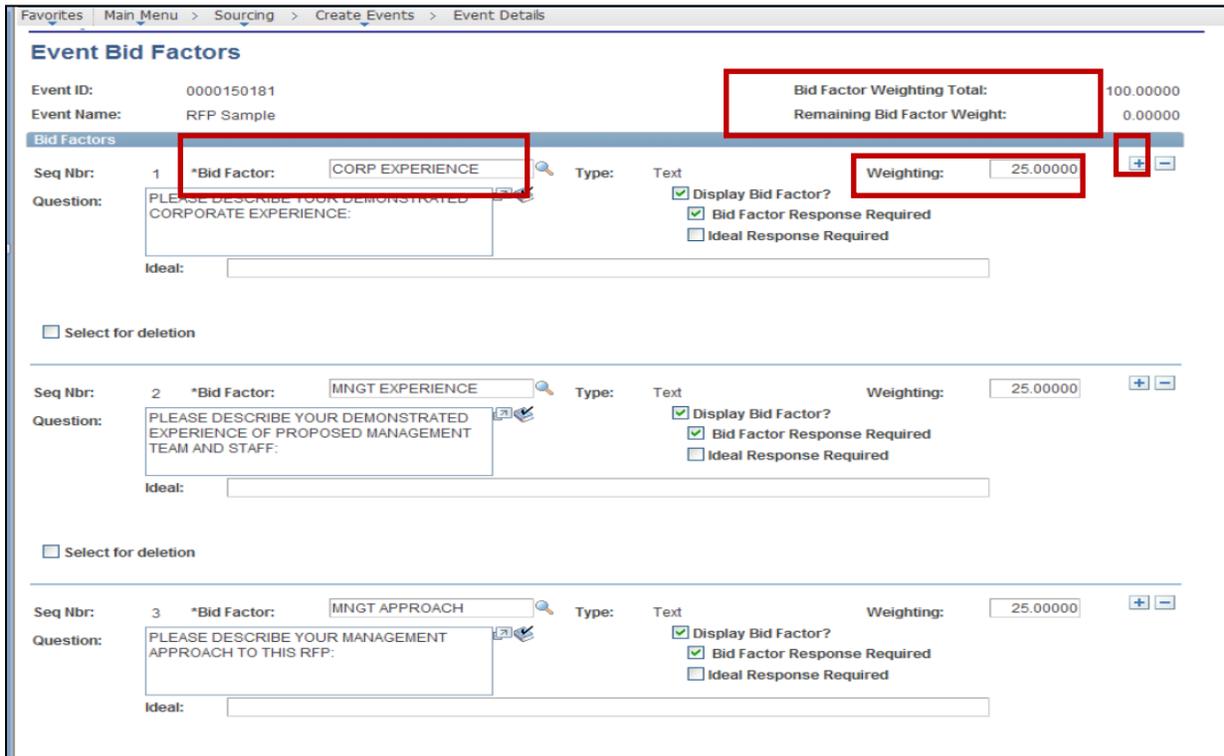
C:\Documents and Settings\mike.hall\Desktop\Desktop | **Browse...**

Upload Cancel

33 Click the **Browse** button and select the attachment to upload.

34 Click the **Upload** button.

35 Click the **Save Event Changes** button to return to the **Event Summary** page.



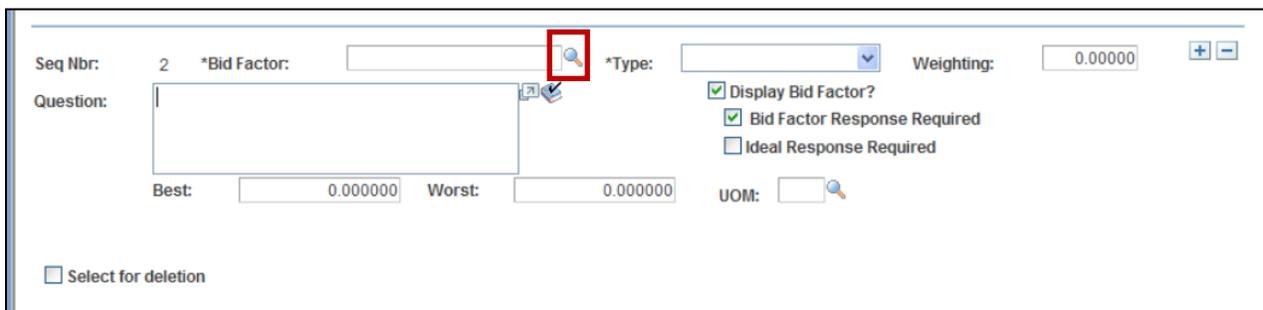
Event ID: 0000150181
Event Name: RFP Sample

Bid Factor Weighting Total: 100.00000
Remaining Bid Factor Weight: 0.00000

Seq Nbr	*Bid Factor	Type	Weighting
1	CORP EXPERIENCE	Text	25.00000
2	MNGT EXPERIENCE	Text	25.00000
3	MNGT APPROACH	Text	25.00000

37 Insert header **Bid Factors** that apply to the event.

Note: Header Bid Factors are specifically applicable to the event and to the ultimate contract in its entirety. In comparison line, **Bid Factors** are specific to the line (good or service) requested only. Each Bid Factor is assigned a weight depending on the level of importance. The SS Buyer assigns weights that equal 100% in total.



Seq Nbr: 2 *Bid Factor: [Search Icon] *Type: [Dropdown] Weighting: 0.00000

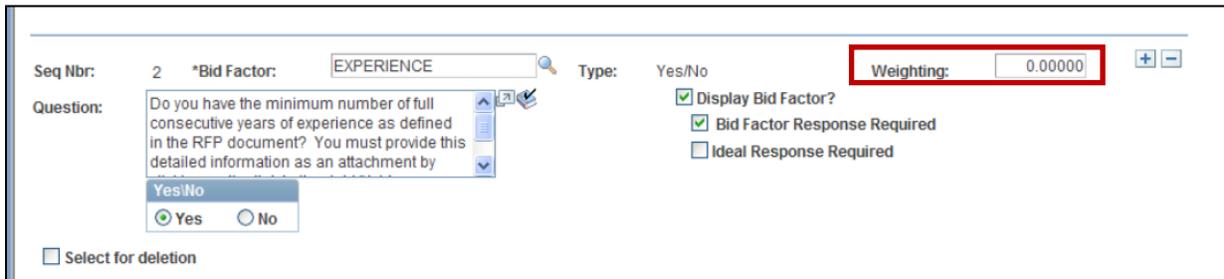
Question: [Text Area]

Best: 0.00000 Worst: 0.00000 UOM: [Search Icon]

38 Click the **Bid Factor** Search icon.

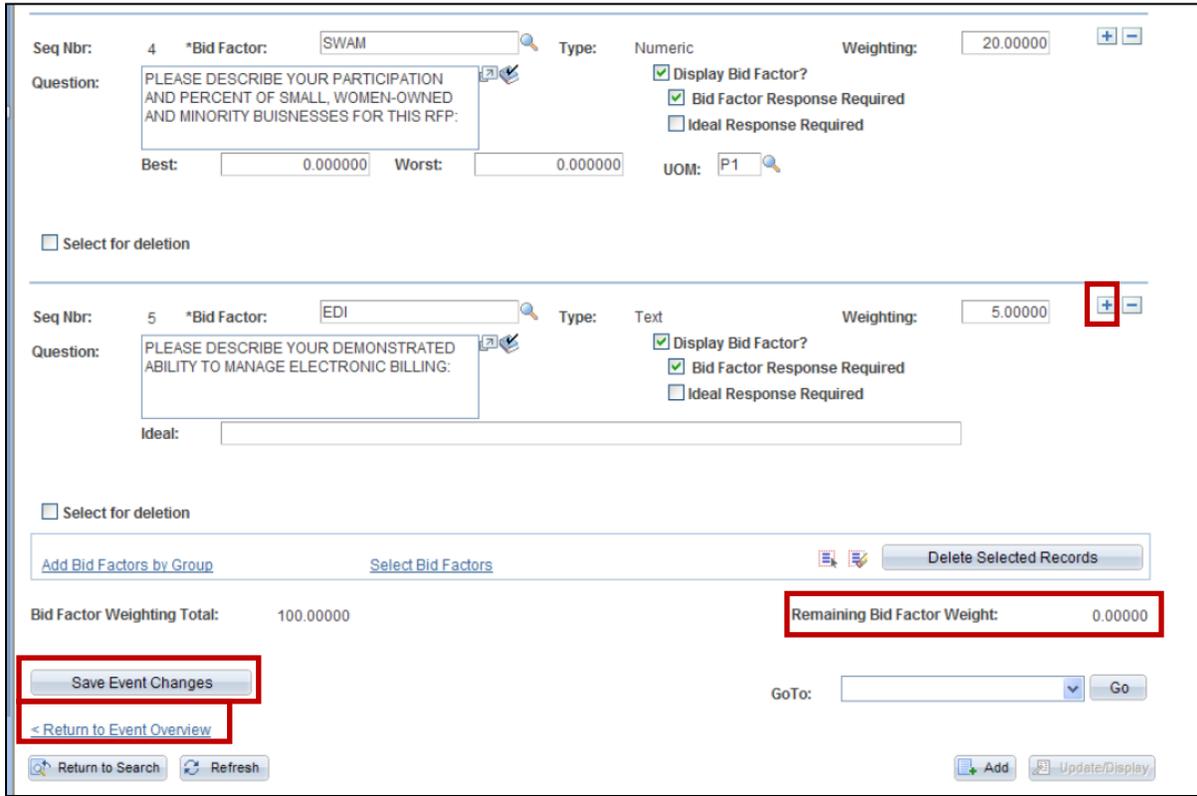


39 A list of **Bid Factors** displays. Select any **Bid Factor** hyperlink to be added as applicable.



40 When a **Bid Factor** is selected, the factor's preloaded information displays. Edit this preloaded information as needed and enter the weighting specific to the factor.

Note: Bid Factors can be selected from what is configured in Cardinal. Factors are set up for a Text response, a Numeric response, a **Yes/No** response, or a monetary response format.



Seq Nbr: 4 *Bid Factor: SWAM Type: Numeric Weighting: 20.00000 + -

Question: PLEASE DESCRIBE YOUR PARTICIPATION AND PERCENT OF SMALL, WOMEN-OWNED AND MINORITY BUSINESSES FOR THIS RFP: Best: 0.000000 Worst: 0.000000 UOM: P1

Display Bid Factor?
 Bid Factor Response Required
 Ideal Response Required

Select for deletion

Seq Nbr: 5 *Bid Factor: EDI Type: Text Weighting: 5.00000 + -

Question: PLEASE DESCRIBE YOUR DEMONSTRATED ABILITY TO MANAGE ELECTRONIC BILLING: Ideal:

Display Bid Factor?
 Bid Factor Response Required
 Ideal Response Required

Select for deletion

[Add Bid Factors by Group](#) [Select Bid Factors](#) [Delete Selected Records](#)

Bid Factor Weighting Total: 100.00000 Remaining Bid Factor Weight: 0.00000

[Save Event Changes](#) GoTo: Go

[< Return to Event Overview](#)

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

- 41 To add more **Bid Factors**, click the  sign.
- 42 If needed, enter 0.00 for the **Remaining Bid Factor Weight**.
- 43 After you have entered all Bid Factors, click the **Save Event Changes** button.
- 44 Click the **Return to Event Overview** hyperlink.

Event Summary

Business Unit: 50100 Event ID: 0000150181 Round: 1 Version: 1 Event Format: Buy

Event Type: RFx

Event Status: Collaborating Event Preview Date: 09/19/2011 2:20PM EDT

*Solicitation Type: Request for Proposal *Start Date: 09/21/2011 1:19PM EDT

*Event Name: RFP Sample *End Date: 09/21/2011 1:30PM EDT

Description: VIRGINIA DEPARTMENT OF TRANSPORTATION REQUEST FOR PROPOSAL Copy From: Go

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constraints](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items

Create line listings for this event.

* Line Items Item Line Defaults

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

45 Click the **Line Items** hyperlink.

Line Items

Business Unit: 50100 Event ID: 0000150181 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go Filtered View: All Lines and Groups

Line Items

Basic Definition Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
<input type="checkbox"/> 1	<input type="text"/>	ITS Consulting Services.	9180612	HUF	6000.000	0.0100	\$60.00	0.00000

Event Total: 60.0000 USD Line Weighting Total: 80 % Remaining Weight: 20 %

Add Selected Lines to Group: OK

[Return to Event Overview](#) GoTo: Go
[Save Event Changes](#)

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

46 Select applicable line item(s) for the RFP.

Note: You may select an **Item ID** or **Category** using the lookup icons. If an **Item ID** is selected, a 10 digit **Item ID** will display. The **Description** and Unit of Measure (**UOM**) is fixed and cannot be changed. If a **Category** is selected, the **Description** and **UOM** must be entered by the SS Buyer. The **Start Price** should always be set to .01 cent.

47 Click the **Advanced Definition** tab.

Line Items

Business Unit: 50100 Event ID: 0000150181 Round: 1 Version: 1 Event Format: Buy Event Type: Rfx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Filtered View: All Lines and Groups

Line Items Customize | Find | View All | First 1 of 1 Last

Line	Item ID	Description	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints	
<input type="checkbox"/> 1	<input type="text"/>	ITS Consulting Services.	STATE	.	Details	Bid Factors	No	 <input type="button" value="+"/> <input type="button" value="-"/>

Event Total: 60.0000 USD Line Weighting Total: 80 % Remaining Weight: 20 %

Add Selected Lines to Group:

[Return to Event Overview](#) GoTo:

48 Click the **Comments** icon.

Line Comments and Attachments

Event ID: 0000150181 Line Number: 1

Enter Comments Find | View All | First 2 of 2 Last

Comments:

Send To Bidder Include On Award [Fetch Item Specs](#)

49 Enter one or multiple comments.

50 Add Attachments (if applicable)

51 Select any **Standard Comments** as applicable.

Note: Check **Send to Bidder** box if you wish to include the comment in the event the bidder

52 Click the **OK** button.

Line Items

Business Unit: 50100 Event ID: 0000150181 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Filtered View: All Lines and Groups

Line	Item ID	Description	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints
1		ITS Consulting Services.	STATE	-	Details	Bid Factors	No

Event Total: 60.0000 USD Line Weighting Total: 80 % Remaining Weight: 20 %

Add Selected Lines to Group:

[Return to Event Overview](#) GoTo:

53 Click the **Details** hyperlink.

Line Details

Event ID: 0000150181 Requested Quantity: 6000.0000

Line: 1 Start Price: 0.0100

Description: ITS Consulting Services. StateWide "On Call" per Task Order Physical Nature: Services

Where Performed: Ship To Location

Item Biddable Only if Grouped

Shipping Information

Schedule: 1

Quantity: 6000.0000 Due Date: 10/15/2011 Freight Terms: FOB DEST

Ship Via: Ship To: CNTRL OF1 Ship From:

Bid Parameters

Bid Required

Reserve Price: Min Quantity: 0.0000 Max Quantity: 6000.0000

Bid Quantity Rule: Requested Quantity Required

Alternate UOM: Not Allowed

User Defined Price Breaks Bidder Defined Price Breaks

Item Specification

Line Image

54 Complete the **Line Details** section as applicable.

55 Click the **OK** button.

Line Items

Business Unit: 50100 Event ID: 0000150181 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go Filtered View: All Lines and Groups

Line Items Customize | Find | View All | First 1 of 1 | Last

Line	Item ID	Description	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints
1		ITS Consulting Services.	STATE	.	Details	Bid Factors	No

Event Total: 60.0000 USD Line Weighting Total: 80 % Remaining Weight: 20 %

Add Selected Lines to Group: OK

[Return to Event Overview](#) GoTo: Go

Save Event Changes

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

56 Click the **Bid Factors** hyperlink.

Favorites | Main Menu > Sourcing > Create Events > Event Details

Line Bid Factors

Line: 1 Bid Factor Weighting Total: 100.00000
 Item ID: Remaining Bid Factor Weight: 0.00000
 Description: ITS Consulting Services, StateWide "On Call" per Task Order

Seq Nbr	Bid Factor	Type	Weighting
1	BID_PRICE	Monetary	25.00000
Question: What is your proposed price per hour for the Principal? <input checked="" type="checkbox"/> Display Bid Factor <input checked="" type="checkbox"/> Bid Factor Response Required <input type="checkbox"/> Ideal Response Required Best: 0.000000 Worst: 0.010000 <input type="checkbox"/> Select for deletion			
2	ADD INFO	Text	40.00000
Question: What is your proposed price per hour for the Engineer? <input checked="" type="checkbox"/> Display Bid Factor <input checked="" type="checkbox"/> Bid Factor Response Required <input type="checkbox"/> Ideal Response Required Ideal: <input type="text"/> <input type="checkbox"/> Select for deletion			

57 Enter line **Bid Factors** information as applicable. The weighting for all Bid Factors must total 100.

Note: Line Bid Factors are specific to the line item(s) only.

58 Scroll to the bottom of the page and click the **OK** button.

Line Items

Business Unit: 50100 Event ID: 0000150181 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Filtered View: All Lines and Groups

Line	Item ID	Description	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints
1		ITS Consulting Services.	STATE	.	Details	Bid Factors	No

Event Total: 60.0000 USD Line Weighting Total: 80 % Remaining Weight: 20 %

Add Selected Lines to Group:

[< Return to Event Overview](#)

GoTo:

59 Click the **Save Event Changes** button.

60 Click the **Return to Event Overview** hyperlink.

Event Summary

Business Unit: 50100 Event ID: 0000150181 Round: 1 Version: 1 Event Format: Buy

Event Type: RFX
 Event Status: Collaborating Event
 *Solicitation Type: Request for Proposal
 *Event Name: RFP Sample
 Description: VIRGINIA DEPARTMENT OF TRANSPORTATION REQUEST FOR PROPOSAL

Preview Date: 09/19/2011 2:20PM EDT
 * Start Date: 09/21/2011 1:19PM EDT
 * End Date: 09/21/2011 1:30PM EDT
 Copy From:

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
 Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constraints](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items
 Create line listings for this event.

[* Line Items](#) [Item Line Defaults](#)

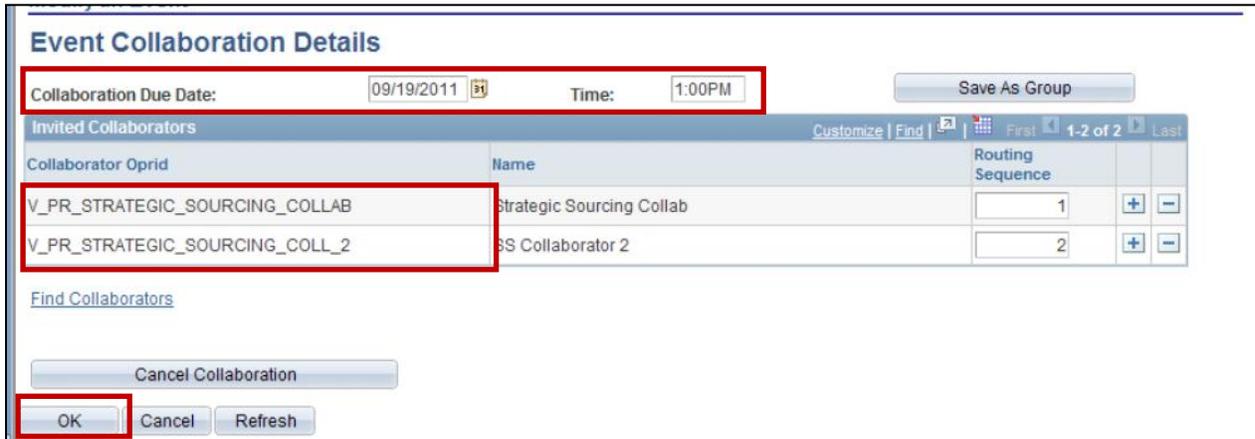
Step 3: Select Bidders to Invite
 Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

Step 4: Invite Collaborators
 Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#) [View Collaboration](#)

- 61 Click the **Event Collaborators** hyperlink



Event Collaboration Details

Collaboration Due Date: 09/19/2011 Time: 1:00PM Save As Group

Collaborator Oprid	Name	Routing Sequence		
V_PR_STRATEGIC_SOURCING_COLLAB	Strategic Sourcing Collab	1	+	-
V_PR_STRATEGIC_SOURCING_COLL_2	BS Collaborator 2	2	+	-

Find Collaborators

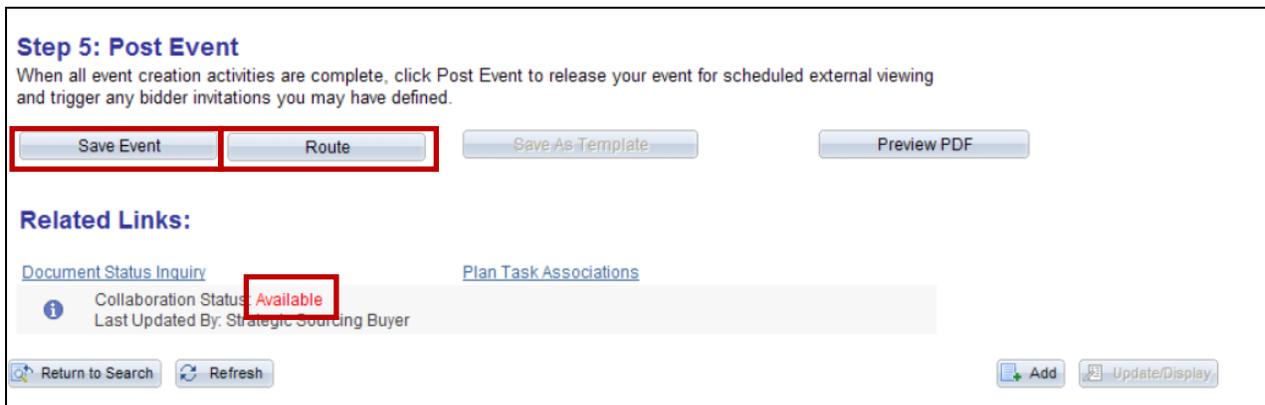
Cancel Collaboration

OK Cancel Refresh

- 62 Use the **Event Collaboration Details** page to invite Collaborators on this event.

Note: More information on collaboration is in the **Strategic Sourcing Collaboration** job aid.

- 63 Enter a **Collaboration Due Date** and **Time** to establish a deadline for all comments.
- 64 Select the Collaborators.
- 65 Click the **OK** button.



Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event Route Save As Template Preview PDF

Related Links:

[Document Status Inquiry](#) [Plan Task Associations](#)

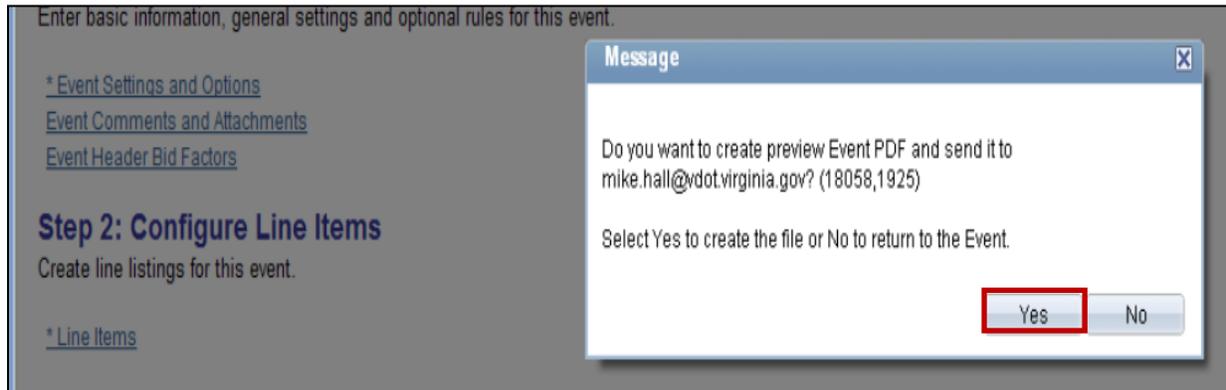
Collaboration Status: Available
Last Updated By: Strategic Sourcing Buyer

Return to Search Refresh Add Update/Display

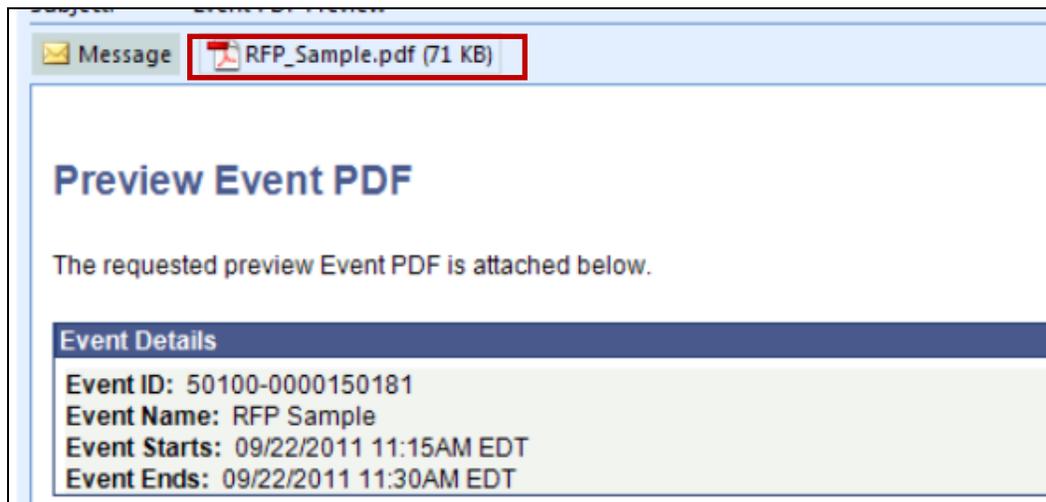
- 66 Click the **Save Event** button.

- 67 Click the **Route** button.

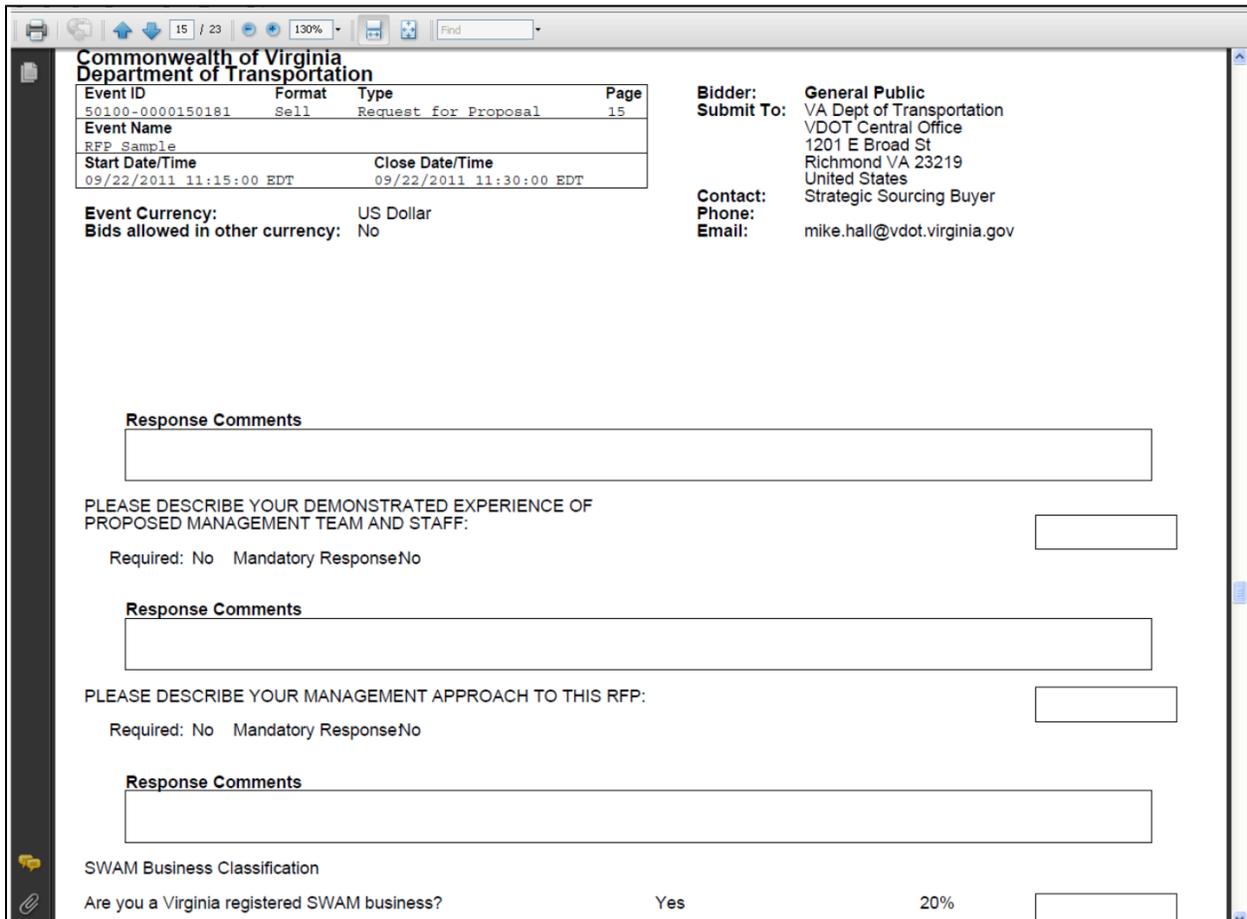
Note: Collaboration Status changes to Available.



- 68 Each Collaborator can now review and/or edit the event. More information on Collaboration is in the **Strategic Sourcing Collaboration** job aid.
- 69 Once Collaborators have completed collaboration (or the collaboration due date and time have passed), review the edits and comments the Collaborators entered. (More information on Collaboration is in the **Strategic Sourcing Collaboration** job aid.) After you have accepted or rejected any collaboration input, the event is ready to be posted for advertisement.
- 70 Navigate using the following path to open the event, if needed:
Main Menu > Worklist > Worklist
- 71 Click the **Preview PDF** button.
- 72 A message displays. Click the **Yes** button to receive the event PDF via email.



- 73 In the email message, open the attached **PDF**.



**Commonwealth of Virginia
Department of Transportation**

Event ID	Format	Type	Page
50100-0000150181	Sell	Request for Proposal	15

Event Name
RFP Sample

Start Date/Time	Close Date/Time
09/22/2011 11:15:00 EDT	09/22/2011 11:30:00 EDT

Event Currency: US Dollar
Bids allowed in other currency: No

Bidder: General Public
Submit To: VA Dept of Transportation
VDOT Central Office
1201 E Broad St
Richmond VA 23219
United States
Contact: Strategic Sourcing Buyer
Phone:
Email: mike.hall@vdot.virginia.gov

Response Comments

PLEASE DESCRIBE YOUR DEMONSTRATED EXPERIENCE OF PROPOSED MANAGEMENT TEAM AND STAFF:

Required: No Mandatory ResponseNo

Response Comments

PLEASE DESCRIBE YOUR MANAGEMENT APPROACH TO THIS RFP:

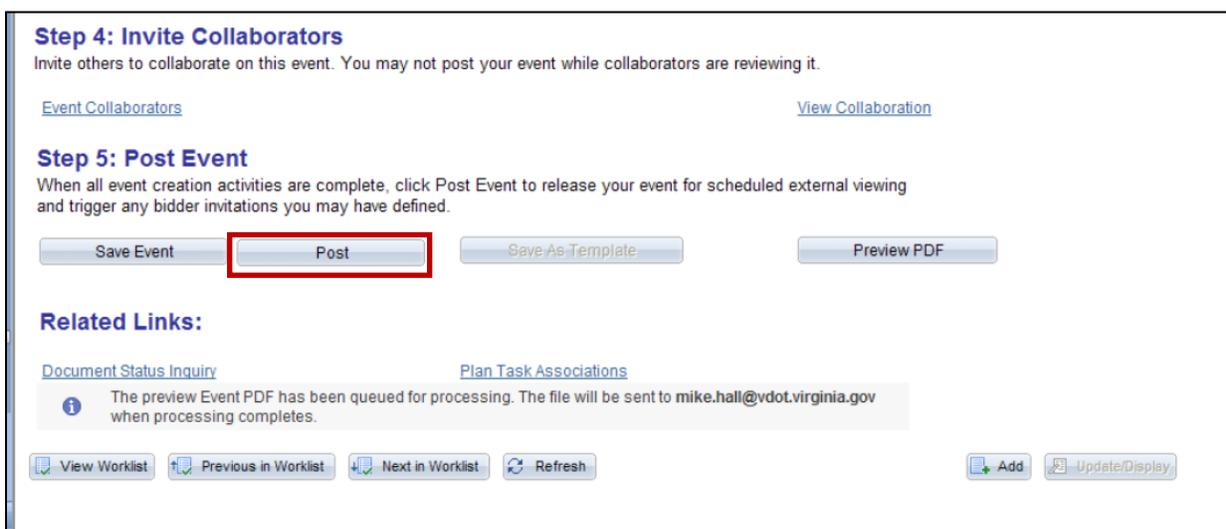
Required: No Mandatory ResponseNo

Response Comments

SWAM Business Classification

Are you a Virginia registered SWAM business? Yes 20%

74 Review the PDF for layout and content with accepted changes from collaboration.



Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#) [View Collaboration](#)

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event **Post** Save As Template Preview PDF

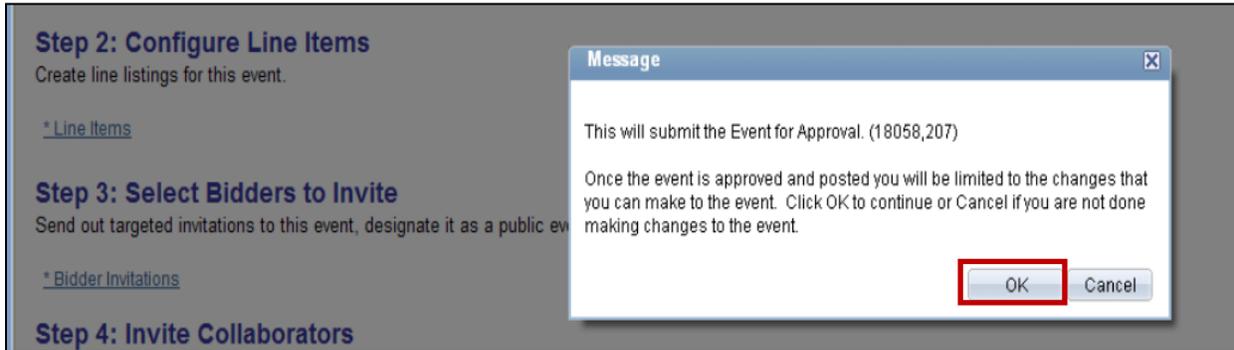
Related Links:

[Document Status Inquiry](#) [Plan Task Associations](#)

The preview Event PDF has been queued for processing. The file will be sent to mike.hall@vdot.virginia.gov when processing completes.

View Worklist Previous in Worklist Next in Worklist Refresh Add Update/Display

75 If the event is ready for posting, click the **Post** button in Cardinal.



Step 2: Configure Line Items
Create line listings for this event.
[* Line Items](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event or both.
[* Bidder Invitations](#)

Step 4: Invite Collaborators

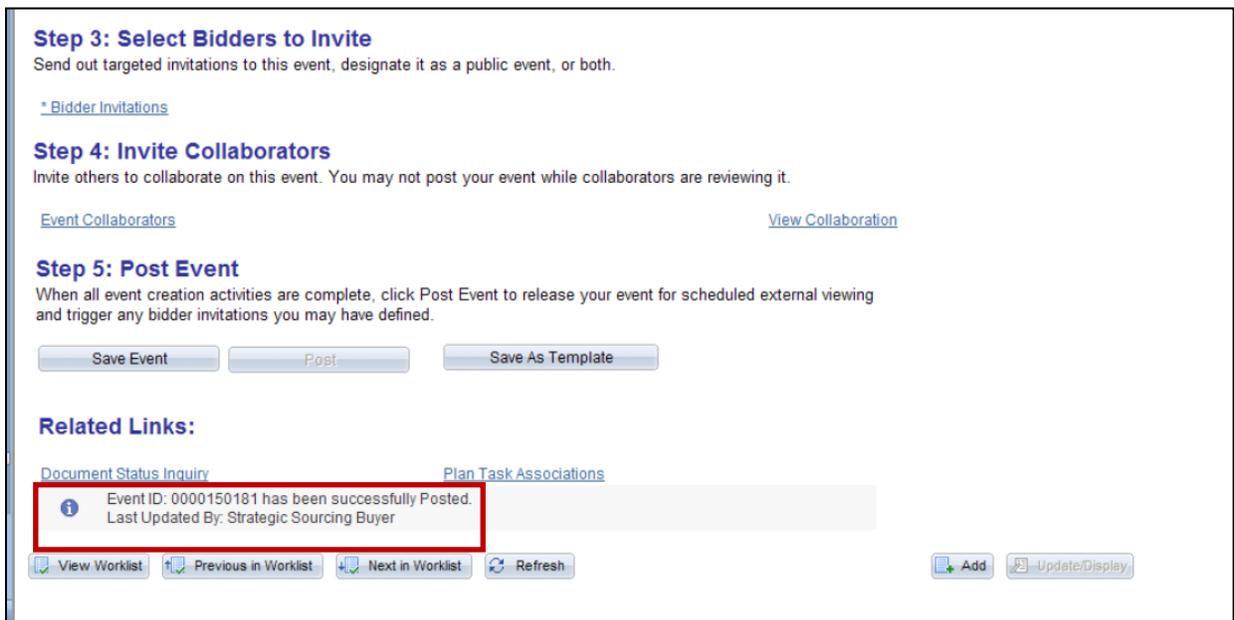
Message

This will submit the Event for Approval. (18058,207)

Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.

OK Cancel

76 Click the **OK** button to submit the event for approval.



Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.
[* Bidder Invitations](#)

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.
[Event Collaborators](#) [View Collaboration](#)

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event Post Save As Template

Related Links:

[Document Status Inquiry](#) [Plan Task Associations](#)

Event ID: 0000150181 has been successfully Posted.
Last Updated By: Strategic Sourcing Buyer

View Worklist Previous in Worklist Next in Worklist Refresh Add Update/Display

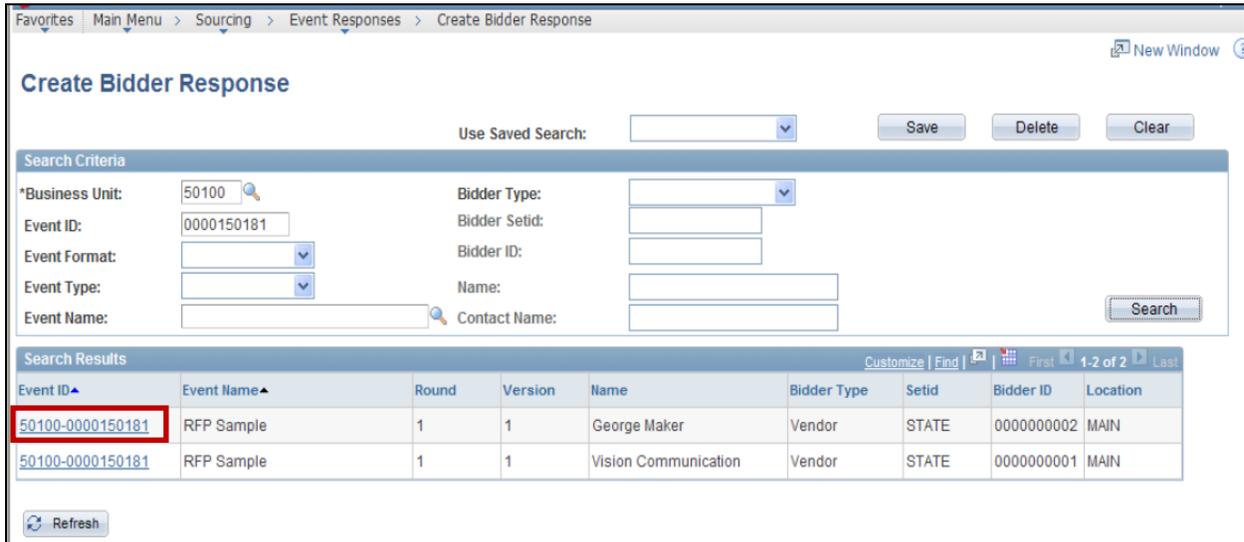
77 Event has started in Cardinal. Post the event **PDF** on eVA as required and follow agency procurement procedures.

Note: After the posting period has lapsed, the event timeline closes. The offerors' proposals are received by the Purchasing Office prior to the closing date/time and made ready for evaluation.

Enter Offeror Responses

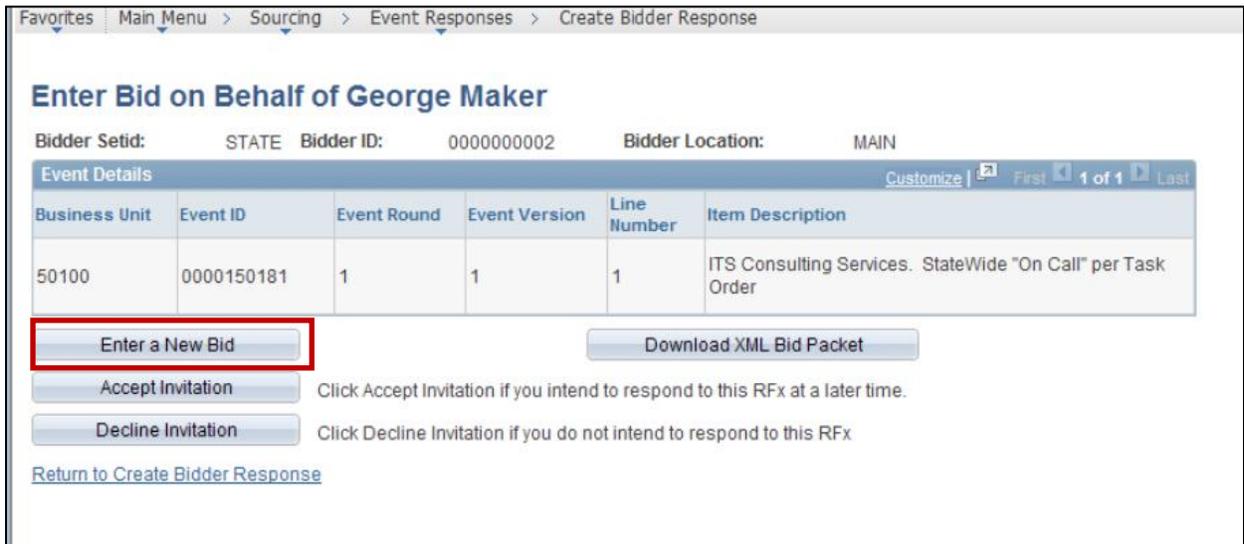
- 1 Navigate using the following path:

Main Menu > Sourcing > Event Responses > Create Bidder Response.



The screenshot shows the 'Create Bidder Response' page. The search criteria section includes fields for Business Unit (50100), Event ID (0000150181), Event Format, Event Type, Event Name, Bidder Type, Bidder Setid, Bidder ID, Name, and Contact Name. A search button is located at the bottom right of the search criteria section. Below the search criteria is a table of search results with columns: Event ID, Event Name, Round, Version, Name, Bidder Type, Setid, Bidder ID, and Location. The first row is highlighted with a red box, showing Event ID 50100-0000150181, Event Name RFP Sample, Round 1, Version 1, Name George Maker, Bidder Type Vendor, Setid STATE, Bidder ID 0000000002, and Location MAIN. A Refresh button is located at the bottom left of the search results section.

- 2 The **Create Bidder Response** page displays. Click the **Event ID** link for the vendor and event you are entering for an offeror response.



The screenshot shows the 'Enter Bid on Behalf of George Maker' page. The page displays the Bidder Setid (STATE), Bidder ID (0000000002), and Bidder Location (MAIN). Below this is an 'Event Details' table with columns: Business Unit, Event ID, Event Round, Event Version, Line Number, and Item Description. The table contains one row with Business Unit 50100, Event ID 0000150181, Event Round 1, Event Version 1, Line Number 1, and Item Description ITS Consulting Services. StateWide "On Call" per Task Order. Below the table are three buttons: 'Enter a New Bid' (highlighted with a red box), 'Accept Invitation', and 'Decline Invitation'. The 'Accept Invitation' button has a tooltip that says 'Click Accept Invitation if you intend to respond to this RFX at a later time.' The 'Decline Invitation' button has a tooltip that says 'Click Decline Invitation if you do not intend to respond to this RFX'. At the bottom of the page is a link 'Return to Create Bidder Response'.

- 3 Click the **Enter a New Bid** button.

Event Details

Welcome, Bid Processor
User: Bid Processor

Event Name: RFP Sample [Bidding Instructions](#)

Event ID: 50100-0000150181

Event Format/Type: Sell Event RFX

Event Start Date: 09/23/2011 8:15AM EDT

Event End Date: **Event Completed**

[View/Add General Comments and Attachments](#)

[Hide Additional Event Info](#)

Bid ID: New

Bid Date:

Bid Currency: US Dollar

Description:

VIRGINIA DEPARTMENT OF TRANSPORTATION
REQUEST FOR PROPOSAL

Issue Date: June 22, 2011 RFP# RFP Sample

Commodity Code: System Operations/ITS/Traffic Engineering On-Call Services Consultant

Contact: Strategic Sourcing Buyer

Phone:

Email: mike.hall@vdot.virginia.gov

Online Discussion:

Payment Terms:

Billing Location: Central Office Old Bldg

Event Currency: Dollar

Conversion Rate: 1.00000000

Edits to Submitted Bids: Not Allowed

Multiple Bids: Not Allowed

Step 1: Answer General Event Questions

The event administrator requests your response to questions not specific to any specific item.

General Event Questions: 5

Required Questions:

Questions Responded To: 0

4 The **Event Details** page displays and is available for entry of the Offeror responses.

Note: Step 1: Answer General Event Questions displays the requirements to be entered.

[Hide Event Questions](#)

Event Questions

★ Bid Required ⚡ Ideal Response Required

General Questions [Previous Questions 1-5 of 5](#) [Next Questions](#)

PLEASE DESCRIBE YOUR DEMONSTRATED CORPORATE EXPERIENCE:

Response: Weighting: 20.00000
[Add Comments or Attachments](#)

PLEASE DESCRIBE YOUR DEMONSTRATED EXPERIENCE OF PROPOSED MANAGEMENT TEAM AND STAFF:

Response: Weighting: 30.00000
[Add Comments or Attachments](#)

PLEASE DESCRIBE YOUR MANAGEMENT APPROACH TO THIS RFP:

Response: Weighting: 25.00000
[Add Comments or Attachments](#)

SWAM Business Classification Are you a Virginia registered SWAM business?

Response: Weighting: 20.00000
 Ideal: Yes [Add Comments or Attachments](#)

- 5 Enter the offeror's responses and **Evaluation Committee** scores on this page.
- 6 Enter the response in the General Question **Response** field.
- 7 Click on the **Add Comments or Attachments** hyperlink to insert responses/docs, as needed.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 1
 Lines Responded To: 0
 Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines [Customize](#) First Previous Lines: 1 of 1 Next Lines

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	ITS Consulting Services. StateWide "On Call" per Task Order	HUR	120000.0000		<input type="text"/>	<input type="checkbox"/>	0.0000 USD	Bid	Comment

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Return to Create Bidder Response](#)

- 8 Click the **Bid** hyperlink.

Favorites | Main Menu > Sourcing > Event Responses > Create Bidder Response

Save for Later Start Page Validate Entries

Line: 1 of 1

Line Details

Line: 1

ITS Consulting Services. StateWide
"On Call" per Task Order

Response Required: No No Bid

Category: CONSULTING - PRINCIPLES OF HPI
[View/Add Question Comments and Attachments](#)

Exact request quantity required.

Unit of Measure: Hour

Qty Requested: 120000.0000

Your Max Bid Quantity: 120000.0000

Max Quantity: 120000.0000

Your Unit Bid Price: 95.000000

Total Bid Price: 11,400,000.0000 USD

Reserve Price: No

Weighting: 40.00000

Line Questions Previous Questions 1 of 1 Next Questions

★ What is your proposed price per hour for the Labor/Fieljld forces

Response: 59.50

Weighting: 40.00000

[Add Comments](#)

Best: 0.0000

Worst: 0.0000

Shipping Information Customize | Find | First 1 of 1 Last

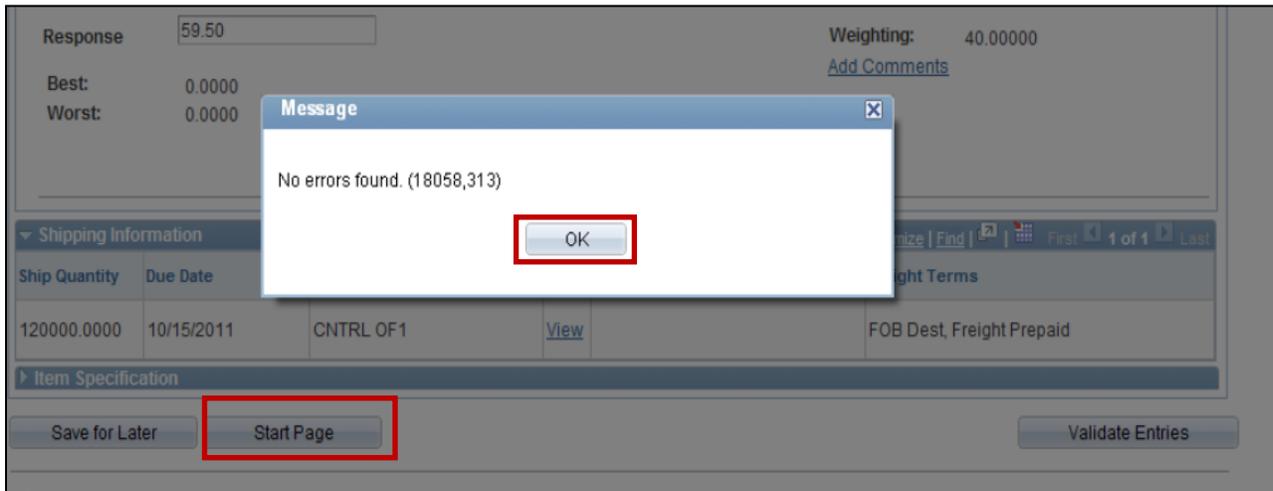
Ship Quantity	Due Date	Ship To Location	Ship Via	Freight Terms
120000.0000	10/15/2011	CNTRL OF1	View	FOB Dest, Freight Prepaid

Item Specification

Save for Later Start Page Validate Entries

9 Enter offeror's responses in the **Response** and **Your Unit Bid Price** fields.

10 Click the **Validate Entries** button.



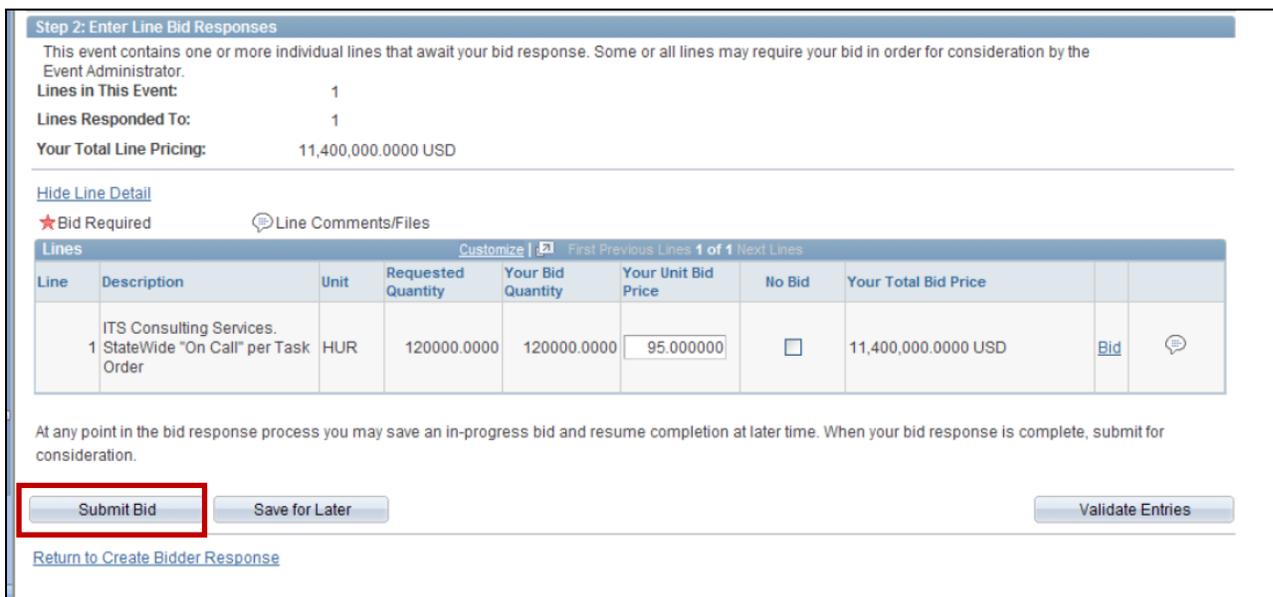
Response: 59.50 Weighting: 40.00000
 Best: 0.0000 Add Comments
 Worst: 0.0000

Message
 No errors found. (18058,313)
 OK

Shipping Information
 Ship Quantity: 120000.0000 Due Date: 10/15/2011 CNTRL OF 1 View FOB Dest, Freight Prepaid

Item Specification
 Save for Later **Start Page** Validate Entries

- 11 A message displays indicating if any errors were found. If none were found, click the **OK** button.
- 12 Click **Start Page** button.



Step 2: Enter Line Bid Responses
 This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.
 Lines in This Event: 1
 Lines Responded To: 1
 Your Total Line Pricing: 11,400,000.0000 USD

Hide Line Detail
 ★ Bid Required Line Comments/Files

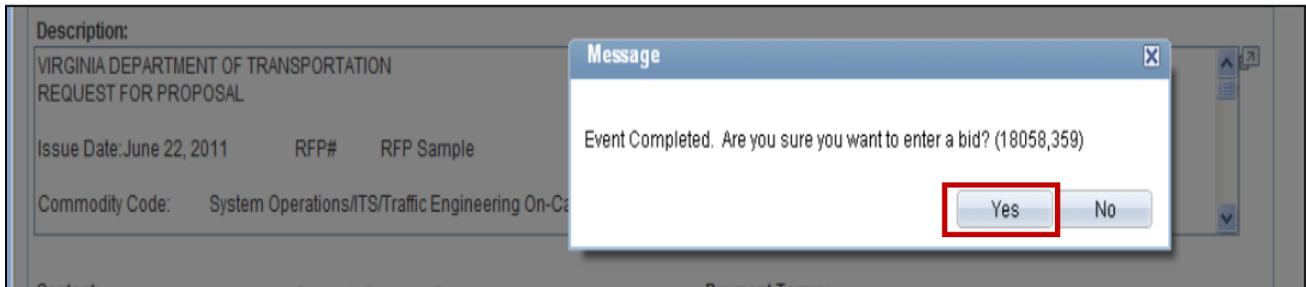
Line	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	No Bid	Your Total Bid Price
1	ITS Consulting Services. StateWide "On Call" per Task Order	HUR	120000.0000	120000.0000	95.000000	<input type="checkbox"/>	11,400,000.0000 USD

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

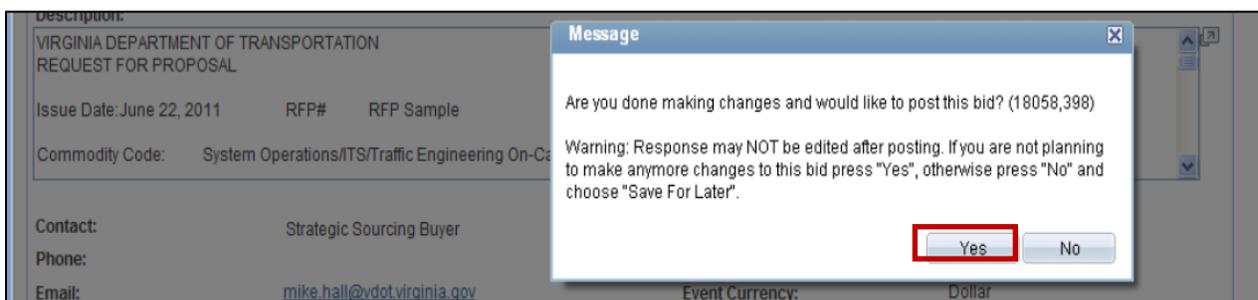
Submit Bid Save for Later Validate Entries

[Return to Create Bidder Response](#)

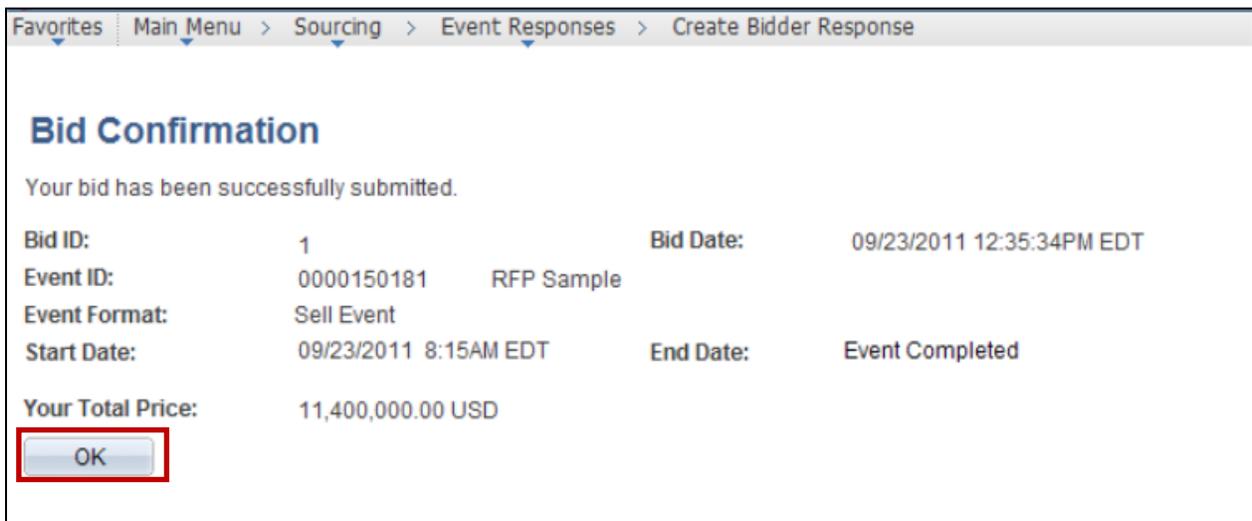
- 13 Click the **Submit Bid** button.



14 A message displays. Click the **Yes** button to confirm that you wish to enter the bid.



15 Another message displays. Click the **Yes** button to post the bid.



16 The **Bid Confirmation** page displays. Click the **OK** button.

[Favorites](#) | [Main Menu](#) > [Sourcing](#) > [Event Responses](#) > [Create Bidder Response](#)
New Window ? Help

Create Bidder Response

Use Saved Search:

Search Criteria

*Business Unit:	<input type="text" value="50100"/>	Bidder Type:	<input type="text"/>
Event ID:	<input type="text" value="0000150181"/>	Bidder Setid:	<input type="text"/>
Event Format:	<input type="text"/>	Bidder ID:	<input type="text"/>
Event Type:	<input type="text"/>	Name:	<input type="text"/>
Event Name:	<input type="text"/>	Contact Name:	<input type="text"/>

Search Results Customize | Find | First 1-2 of 2 Last

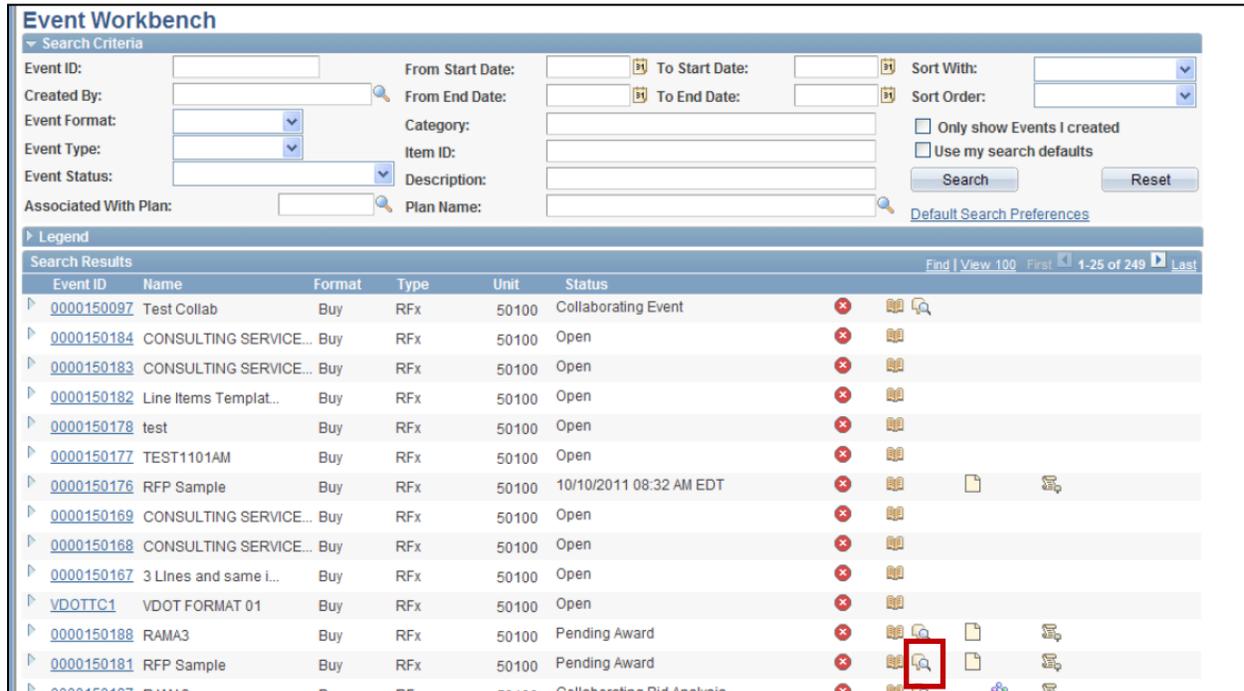
Event ID	Event Name	Round	Version	Name	Bidder Type	Setid	Bidder ID	Location
50100-0000150181	RFP Sample	1	1	George Maker	Vendor	STATE	0000000002	MAIN
50100-0000150181	RFP Sample	1	1	Vision Communication	Vendor	STATE	0000000001	MAIN

- 17 Enter the other offeror's responses by clicking on the appropriate **Event ID** link.
- 18 Once the offeror responses have been submitted, the event is ready for evaluation.

Analyzing Proposals and Awarding RFP Events

- 1 Navigate using the following path:

Main Menu > Sourcing > Maintain Events > Event Workbench



Event Workbench

Search Criteria

Event ID: From Start Date: To Start Date: Sort With:

Created By: From End Date: To End Date: Sort Order:

Event Format: Category: Only show Events I created

Event Type: Item ID: Use my search defaults

Event Status: Description:

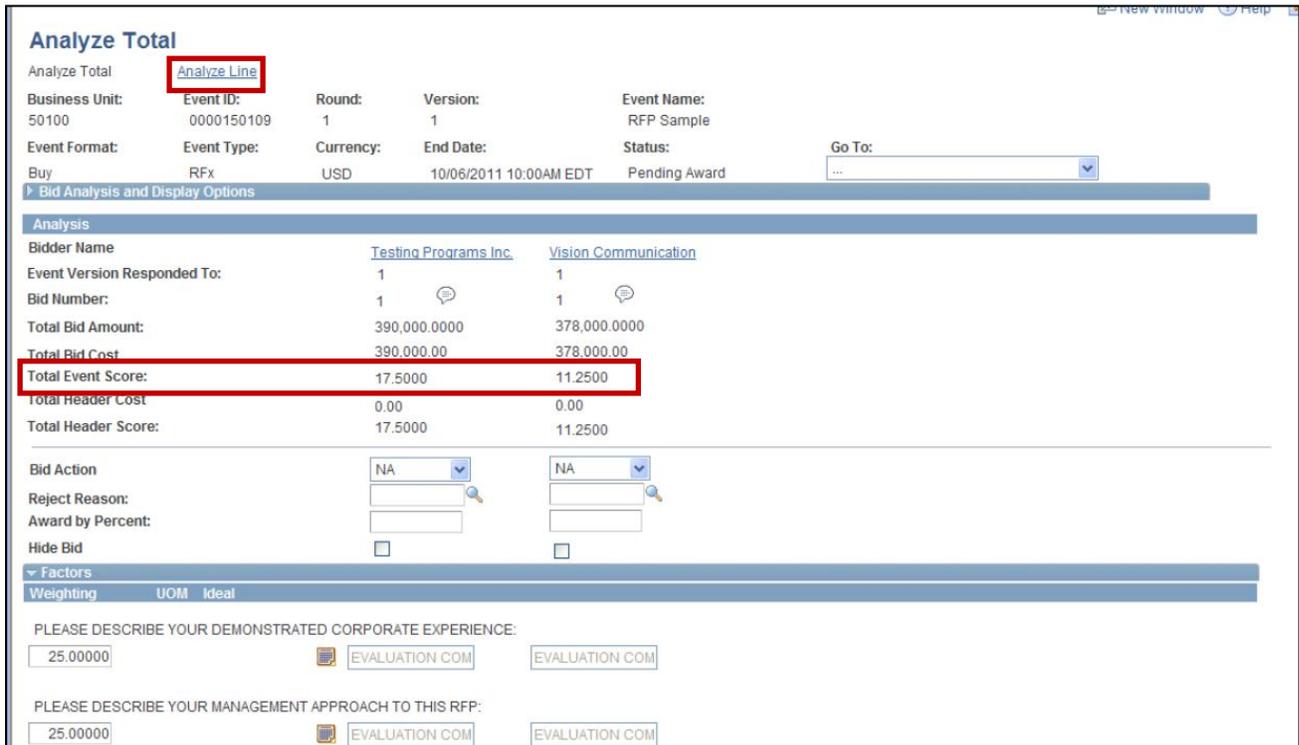
Associated With Plan: Plan Name: [Default Search Preferences](#)

Legend

Search Results Find | View 100 | First | 1-25 of 249 | Last

Event ID	Name	Format	Type	Unit	Status			
0000150097	Test Collab	Buy	RFx	50100	Collaborating Event	✖	📄	🔍
0000150184	CONSULTING SERVICE...	Buy	RFx	50100	Open	✖	📄	
0000150183	CONSULTING SERVICE...	Buy	RFx	50100	Open	✖	📄	
0000150182	Line Items Templat...	Buy	RFx	50100	Open	✖	📄	
0000150178	test	Buy	RFx	50100	Open	✖	📄	
0000150177	TEST1101AM	Buy	RFx	50100	Open	✖	📄	
0000150176	RFP Sample	Buy	RFx	50100	10/10/2011 08:32 AM EDT	✖	📄	📄
0000150169	CONSULTING SERVICE...	Buy	RFx	50100	Open	✖	📄	
0000150168	CONSULTING SERVICE...	Buy	RFx	50100	Open	✖	📄	
0000150167	3 Lines and same i...	Buy	RFx	50100	Open	✖	📄	
VDOITC1	VDOT FORMAT 01	Buy	RFx	50100	Open	✖	📄	
0000150188	RAMA3	Buy	RFx	50100	Pending Award	✖	📄	🔍
0000150181	RFP Sample	Buy	RFx	50100	Pending Award	✖	📄	🔍
0000150187	RAMA3	Buy	RFx	50100	Collaborating Bid Analysis	✖	📄	🔍

- 2 The **Event Workbench** page displays. Enter search criteria to find the event you wish to view, if necessary.
- 3 Click the **Analyze Bids** icon.



Analyze Total

Analyze Total [Analyze Line](#)

Business Unit: 50100 Event ID: 0000150109 Round: 1 Version: 1 Event Name: RFP Sample

Event Format: Buy Event Type: RFX Currency: USD End Date: 10/06/2011 10:00AM EDT Status: Pending Award Go To: ...

▶ Bid Analysis and Display Options

Analysis

Bidder Name	Testing Programs Inc.	Vision Communication
Event Version Responded To:	1	1
Bid Number:	1	1
Total Bid Amount:	390,000.0000	378,000.0000
Total Bid Cost:	390,000.00	378,000.00
Total Event Score:	17.5000	11.2500
Total Header Cost:	0.00	0.00
Total Header Score:	17.5000	11.2500

Bid Action: NA NA

Reject Reason:

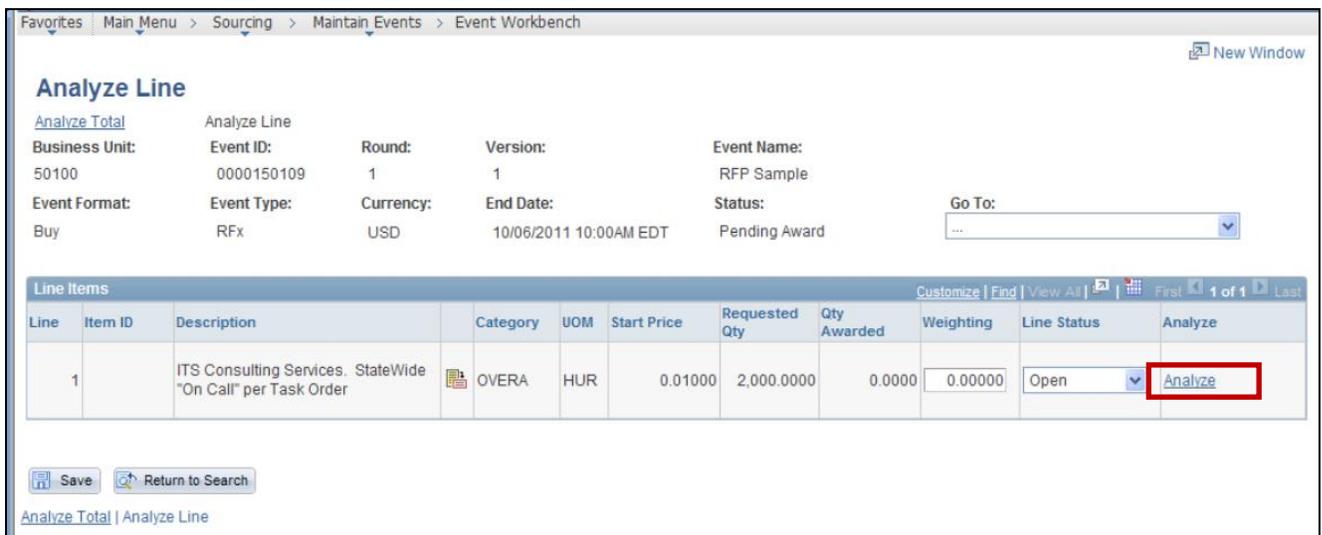
Award by Percent:

Hide Bid:

▼ Factors

Weighting	UOM	Ideal	
PLEASE DESCRIBE YOUR DEMONSTRATED CORPORATE EXPERIENCE:	25.00000	EVALUATION.COM	EVALUATION.COM
PLEASE DESCRIBE YOUR MANAGEMENT APPROACH TO THIS RFP:	25.00000	EVALUATION.COM	EVALUATION.COM

- 4 The **Analyze Total** page displays with response tabulation and the current Event Score for each offeror as calculated by Cardinal.
- 5 Click the **Analyze Line** hyperlink.



Analyze Line

[Analyze Total](#) Analyze Line

Business Unit: 50100 Event ID: 0000150109 Round: 1 Version: 1 Event Name: RFP Sample

Event Format: Buy Event Type: RFX Currency: USD End Date: 10/06/2011 10:00AM EDT Status: Pending Award Go To: ...

Line Items

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1		ITS Consulting Services. StateWide "On Call" per Task Order	OVERA	HUR	0.01000	2,000.0000	0.0000	0.00000	Open	Analyze

Save Return to Search

Analyze Total | Analyze Line

- 6 Click the **Analyze** hyperlink.



Procurement Job Aid

Request For Proposal (RFP)

Favorites | Main Menu > Sourcing > Maintain Events > Event Workbench

Analyze Line

Business Unit: 50100 Event ID: 0000150109 Round: 1 Version: 1 Event Name: RFP San
Event Format: Buy Event Type: RFx Currency: USD End Date: 10/06/2011 10:00AM EDT Status: Pending

Line: 1 Requested Quantity: 2000.0000 UOM: Item Description: [ITS Consulting Services, StateWide](#)
["On Call" pe...](#)

Analysis

	Vision Communication	Testing Programs Inc.
Bidder Name		
Event Version:	1	1
Bid Number:	1	1
Bid Quantity:	2,000.0000	2,000.0000
Minimum Bid Quantity	0.0000	0.0000
Total Bid Amount:	378,000.0000	390,000.0000
Total Bid Cost:	378,000.00	390,000.00
Total Line Score:	100.0000	10.0000

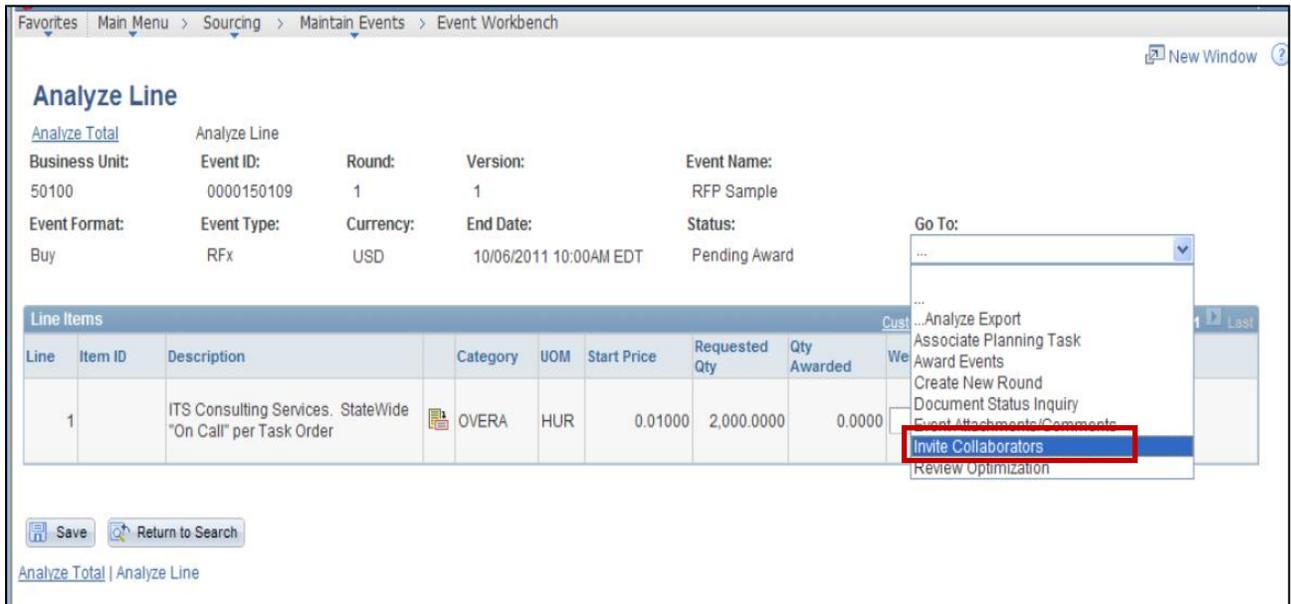
Bid Action: NA NA
Reject Reason Code:
Award by Percent:
Award Quantity:
Hide Bid:

Factors

Weighting	UOM	Ideal
What is your bid price for the Engineer?		
90.00000	0	189.00 195.00
Does your company accept Procurement cards as a method of payment?		
10.00000	Y	Y Y

Recalculate Unhide Bids

- 7 The **Analyze Line** page displays. Line pricing and factors appear with the total Line Score as calculated by Cardinal.
- 8 Scroll down and click the **OK** button at the bottom of the page.



The screenshot shows the 'Analyze Line' window with the following details:

- Business Unit:** 50100
- Event ID:** 0000150109
- Round:** 1
- Version:** 1
- Event Name:** RFP Sample
- Event Format:** Buy
- Event Type:** RFX
- Currency:** USD
- End Date:** 10/06/2011 10:00AM EDT
- Status:** Pending Award

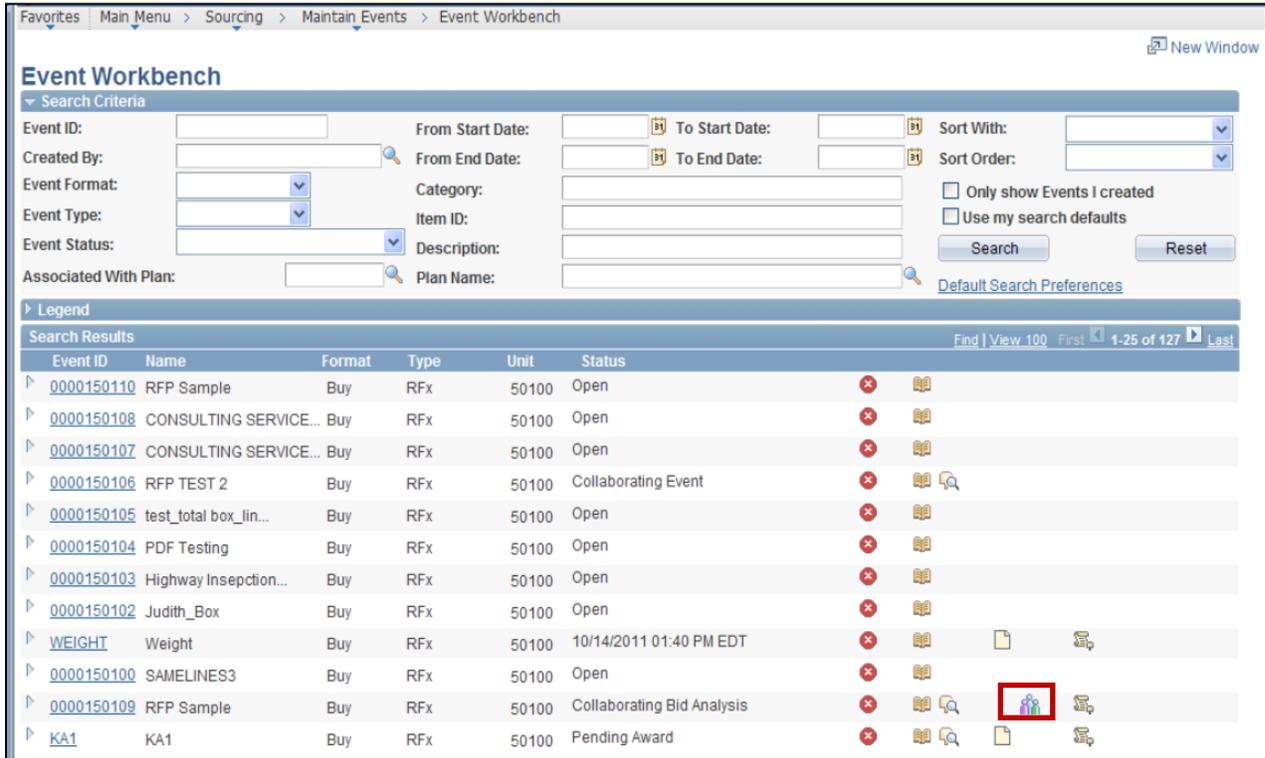
Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	We
1		ITS Consulting Services, StateWide "On Call" per Task Order	OVERA	HUR	0.01000	2,000.0000	0.0000	

The 'Go To' dropdown menu is open, showing the following options:

- ...Analyze Export
- Associate Planning Task
- Award Events
- Create New Round
- Document Status Inquiry
- Event Attachments/Comments
- Invite Collaborators** (highlighted with a red box)
- Review Optimization

Buttons at the bottom: Save, Return to Search.

- 9 Select **Invite Collaborators** from the **Go To** drop down menu.



The screenshot shows the 'Event Workbench' interface. At the top, there is a breadcrumb trail: 'Favorites > Main Menu > Sourcing > Maintain Events > Event Workbench'. Below this is a 'Search Criteria' section with various input fields for Event ID, Created By, Event Format, Event Type, Event Status, Associated With Plan, From Start Date, To Start Date, From End Date, To End Date, Category, Item ID, Description, and Plan Name. There are also checkboxes for 'Only show Events I created' and 'Use my search defaults', along with 'Search' and 'Reset' buttons. Below the search criteria is a 'Legend' section and a 'Search Results' table. The table has columns for Event ID, Name, Format, Type, Unit, and Status. The results list several RFP events, with the last row, 'KA1' (KA1), highlighted. A red box highlights the 'View Collaboration' icon (a group of people) in the action column for the 'KA1' row.

Event ID	Name	Format	Type	Unit	Status
0000150110	RFP Sample	Buy	RFx	50100	Open
0000150108	CONSULTING SERVICE...	Buy	RFx	50100	Open
0000150107	CONSULTING SERVICE...	Buy	RFx	50100	Open
0000150106	RFP TEST 2	Buy	RFx	50100	Collaborating Event
0000150105	test_total box_lin...	Buy	RFx	50100	Open
0000150104	PDF Testing	Buy	RFx	50100	Open
0000150103	Highway Insepection...	Buy	RFx	50100	Open
0000150102	Judith_Box	Buy	RFx	50100	Open
WEIGHT	Weight	Buy	RFx	50100	10/14/2011 01:40 PM EDT
0000150100	SAMELINES3	Buy	RFx	50100	Open
0000150109	RFP Sample	Buy	RFx	50100	Collaborating Bid Analysis
KA1	KA1	Buy	RFx	50100	Pending Award

- 10 Use the **Event Collaboration Details** page to invite Collaborators to analyze the proposals. More information on collaboration is in the **Strategic Sourcing Collaboration** job aid.
- 11 After Collaboration has completed, the SS Buyer can complete the award by clicking the email notification link or by navigating to the Event Workbench.
- 12 Navigate to **Main Menu > Sourcing > Maintain Events > Event Workbench**
- 13 The **Event Workbench** page displays. Enter search criteria to find the event you wish to view, if necessary.
- 14 From the **Event Workbench** page, click the **View Collaboration** icon.



Procurement Job Aid

Request For Proposal (RFP)

Favorites | Main Menu > Sourcing > Maintain Events > Event Workbench

Analyze Total

Analyze Total [Analyze Line](#)

Business Unit: 50100 Event ID: 0000150109 Round: 1 Version: 1 Event Name: RFP Sample

Event Format: Event Type: Currency: End Date: 10/06/2011 10:00AM EDT Status: Pending Award Go To: [...]

Buy: RFX USD

↓ Bid Analysis and Display Options

Analysis

Bidder Name	Testing Programs Inc.	Vision Communication			
Event Version Responded To:	1	1			
Bid Number:	1	1			
Total Bid Amount:	390,000.0000	378,000.0000			
Total Bid Cost	390,000.00	378,000.00			
HALL, MIKE	0.00	0.00	0.00	0.00	0.00
SARTINI, TIM	0.00	0.00	0.00	0.00	0.00
Average	390,000.00	378,000.00	0.00	0.00	0.00
Total Event Score:	66.2500	58.7500			
HALL, MIKE	0.0000	0.0000	0.0000	0.0000	0.0000
SARTINI, TIM	0.0000	0.0000	0.0000	0.0000	0.0000
Average	66.2500	58.7500	0.0000	0.0000	0.0000
Total Header Cost	0.00	0.00			
HALL, MIKE	0.00	0.00	0.00	0.00	0.00
SARTINI, TIM	0.00	0.00	0.00	0.00	0.00
Average	0.00	0.00	0.00	0.00	0.00
Total Header Score:	66.2500	58.7500			
HALL, MIKE	51.2500	59.0000	0.0000	0.0000	0.0000
SARTINI, TIM	42.6250	63.0000	0.0000	0.0000	0.0000
Average	53.3750	60.2500	0.0000	0.0000	0.0000

Bid Action: [NA] [NA]

Reject Reason: [] []

Award by Percent: [] []

Hide Bid

Factors

Weighting UOM Ideal

PLEASE DESCRIBE YOUR DEMONSTRATED CORPORATE EXPERIENCE:

25.00000 [EVALUATION COM] [EVALUATION COM]

Bidder Details					
HALL, MIKE	25.00000	33.00	89.00		
SARTINI, TIM	25.00000	42.500	37.00		

PLEASE DESCRIBE YOUR MANAGEMENT APPROACH TO THIS RFP:

25.00000 [EVALUATION COM] [EVALUATION COM]

Bidder Details					
HALL, MIKE	25.00000	79.00	12.00		
SARTINI, TIM	25.00000	12.00	80.0		

PLEASE DESCRIBE YOUR DEMONSTRATED EXPERIENCE OF PROPOSED MANAGEMENT TEAM AND STAFF:

25.00000 [EVALUATION COM] [EVALUATION COM]

Bidder Details					
HALL, MIKE	25.00000	23.00	90.0		
SARTINI, TIM	25.00000	46.00	90.0		

PLEASE DESCRIBE YOUR PARTICIPATION AND PERCENT OF SMALL, WOMEN-OWNED AND MINORITY BUSINESSES FOR THIS RFP:

25.00000 P1 100 [70.00] [45.00]

Bidder Details					
HALL, MIKE	25.00000				
SARTINI, TIM	25.00000				

15 The **Analyze Total** page displays.

16 The collaborators' scores and average calculations for each response appear. The factors and scores by each factor also appear.

Analysis					
Bidder Name	Testing Programs Inc.	Vision Communication			
Event Version Responded To:	1	1			
Bid Number:	1	1			
Total Bid Amount:	390,000.0000	378,000.0000			
Total Bid Cost	390,000.00	378,000.00			
HALL, MIKE	0.00	0.00	0.00	0.00	0.00
SARTINI, TIM	0.00	0.00	0.00	0.00	0.00
Average	390,000.00	378,000.00	0.00	0.00	0.00
Total Event Score:	66.2500	58.7500			
HALL, MIKE	0.0000	0.0000	0.0000	0.0000	0.0000
SARTINI, TIM	0.0000	0.0000	0.0000	0.0000	0.0000
Average	66.2500	58.7500	0.0000	0.0000	0.0000
Total Header Cost	0.00	0.00			
HALL, MIKE	0.00	0.00	0.00	0.00	0.00
SARTINI, TIM	0.00	0.00	0.00	0.00	0.00
Average	0.00	0.00	0.00	0.00	0.00
Total Header Score:	66.2500	58.7500			
HALL, MIKE	51.2500	59.0000	0.0000	0.0000	0.0000
SARTINI, TIM	42.6250	63.0000	0.0000	0.0000	0.0000
Average	53.3750	60.2500	0.0000	0.0000	0.0000

Bid Action	NA	Award
Reject Reason:		
Award by Percent:		100
Hide Bid	<input type="checkbox"/>	<input type="checkbox"/>

Factors

Recalculate Add / Edit Factors Unhide Bids

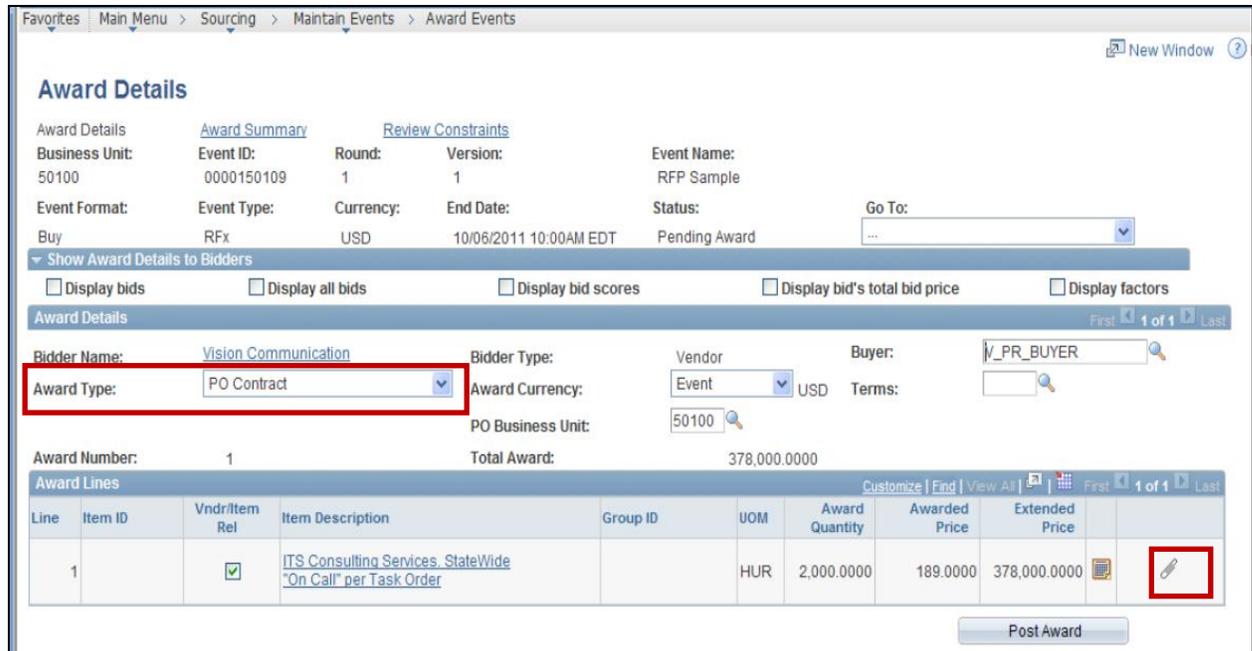
Save Return to Search

17 Based on the overall scores, make the award to the qualifying vendor by selecting *Award* in the **Bid Action** field and entering 100 in the **Award by Percent** field.

18 Click the **Save** button.

19 Navigate using the following path:

Main Menu > Sourcing > Maintain Events > Award Events



Award Details

[Award Summary](#) [Review Constraints](#)

Business Unit: 50100 Event ID: 0000150109 Round: 1 Version: 1 Event Name: RFP Sample

Event Format: Buy Event Type: RFX Currency: USD End Date: 10/06/2011 10:00AM EDT Status: Pending Award Go To: [...]

Show Award Details to Bidders

Display bids Display all bids Display bid scores Display bid's total bid price Display factors

Award Details First 1 of 1 Last

Bidder Name: [Vision Communication](#) Bidder Type: Vendor Buyer: /_PR_BUYER

Award Type: PO Contract Award Currency: Event USD Terms: [...]

PO Business Unit: 50100

Award Number: 1 Total Award: 378,000.0000

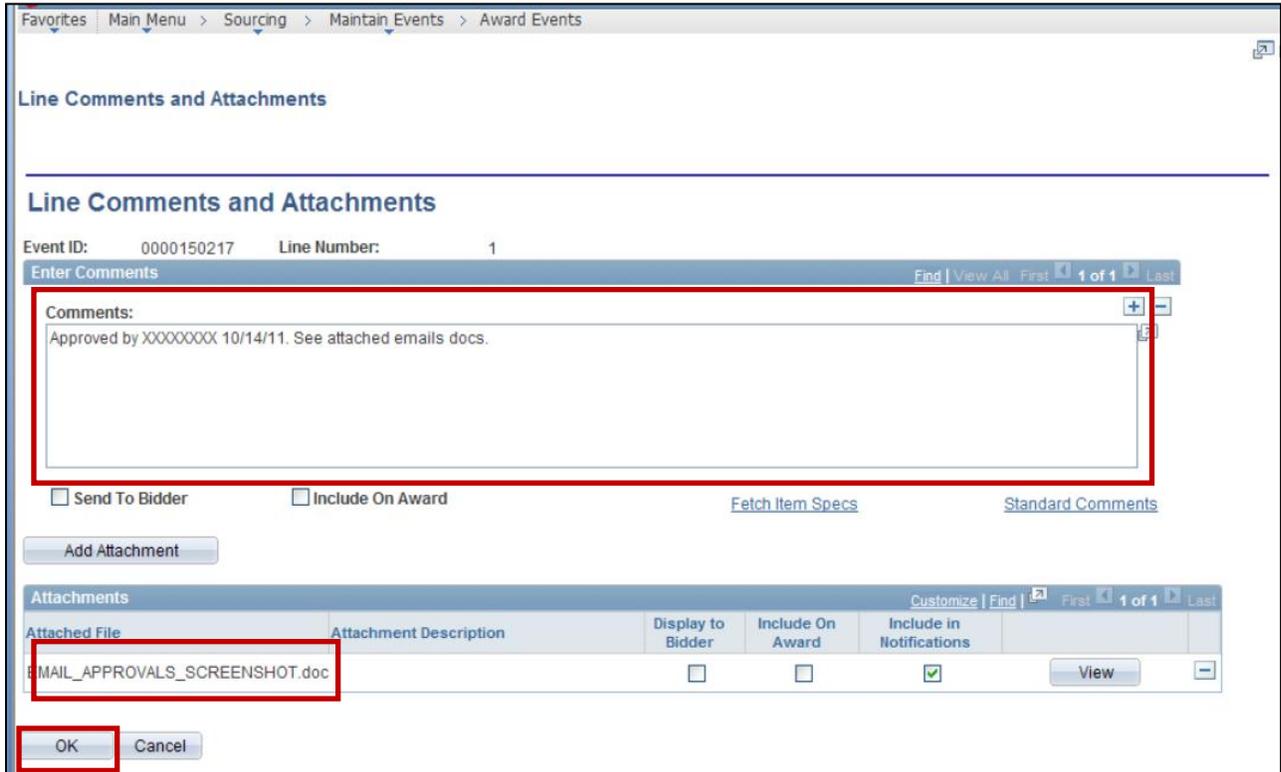
Line	Item ID	Vndr/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price
1		<input checked="" type="checkbox"/>	ITS Consulting Services, StateWide 'On Call' per Task Order		HUR	2,000.0000	189.0000	378,000.0000

Post Award

20 The **Award Details** page displays.

21 Select **PO Contract** in the **Award Type** field.

22 Click the **Attachment** icon.



Line Comments and Attachments

Line Comments and Attachments

Event ID: 0000150217 Line Number: 1

Enter Comments Find | View All First 1 of 1 Last

Comments:
Approved by XXXXXXXX 10/14/11. See attached emails docs.

Send To Bidder Include On Award [Fetch Item Specs](#) [Standard Comments](#)

Add Attachment

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
EMAIL_APPROVALS_SCREENSHOT.doc		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View

OK Cancel

23 Enter comments in the **Comments** field to support the award decision.

Note: Attachments may be inserted here.

24 Click the **OK** button.

Favorites | Main Menu > Sourcing > Maintain Events > Award Events New Window ?

Award Details

[Award Summary](#) [Review Constraints](#)
 Business Unit: 50100 Event ID: 0000150109 Round: 1 Version: 1 Event Name: RFP Sample
 Event Format: Buy Event Type: RFX Currency: USD End Date: 10/06/2011 10:00AM EDT Status: Pending Award Go To:

Display bids
 Display all bids
 Display bid scores
 Display bid's total bid price
 Display factors

Award Details First 1 of 1 Last
 Bidder Name: [Vision Communication](#) Bidder Type: Vendor Buyer: V_PR_BUYER
 Award Type: PO Contract Award Currency: Event USD Terms:
 PO Business Unit: 50100
 Award Number: 1 Total Award: 378,000.0000

Line	Item ID	Vndr/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
1		<input checked="" type="checkbox"/>	ITS Consulting Services_StateWide "On Call" per Task Order		HUR	2,000.0000	189.0000	378,000.0000		

25 Click the **Post Award** button.

Favorites | Main Menu > Sourcing > Maintain Events > Award Events New Window ?

Award Details

[Award Summary](#) [Review Constraints](#)
 Business Unit: 50100 Event ID: 0000150217 Round: 1 Version: 1 Event Name: RFP Sample (Clean Version)
 Event Format: Buy Event Type: RFX Currency: USD End Date: 10/14/2011 10:45AM EDT Status: Awarded Go To:

Display bids
 Display all bids
 Display bid scores
 Display bid's total bid price
 Display factors

Award Details First 1 of 1 Last
 Bidder Name: [Vision Communication2](#) Bidder Type: Vendor Buyer: V_PR_BUYER
 Award Type: PO Contract Award Currency: Event USD Terms: 30
 PO Business Unit: 50100
 Award Number: 1 Total Award: 1,260,000.0000

Line	Item ID	Vndr/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
1		<input checked="" type="checkbox"/>	ITS Consulting Services_StateWide		HUR	6,000.0000	210.0000	1,260,000.0000		

26 Contract ID is created.